OFFICE OF FINANCIAL MANAGEMENT

BUDGET AND ALLOTMENT SUPPORT SYSTEMS (BASS)

SALARY PROJECTION SYSTEM (SPS)
USING SPS FOR SALARY PROJECTION
Tutorial

Version 1.4 Final*
January 2004

**Changes between version 1.3 and 1.4 contains only formatting and typographical error changes. The content between the two versions is unchanged.*

Table of Contents

About this Tutorial

TUTORIAL OBJECTIVE
This tutorial was developed to take budget staff through the most common sequential steps for developing a staffing projection using SPS.

HOW TO USE THE TUTORIAL
This tutorial can be used in a formal training session, for individual practice, or developing the agency salary projection. Each task is preceded by a brief explanation of the task and its importance in your projection development as well as general business rules. Examples for data entry and selection are provided for use in formal training or individual practice. Alternatively, users can follow the steps without the use of the examples for true agency use. Specific business rules and recommendations for using SPS are denoted with a 🕮 on the task. Appendix 1 contains a listing of all these business rules.

ABOUT FEATURE LESSONS
Use of features will be described in great detail the first instance in the tutorial. Subsequent steps that utilize the same feature will be more generic drawing on the users basic understanding of the feature already described. For example, the first time adding a position file, the instruction will describe every option and button available, whereas subsequent step to add a position will only state, “add a position file”.

SYSTEM ISSUES (BUGS) & RELEASE NOTES
There are some known issues (or problems) with the November 2003 Release of SPS. Please see Appendix 3 for “Release Notes” describing these known issues.

ADDITIONAL RESOURCES
Not every feature of SPS will be covered. The SPS Complete System Manual will available to users in January 2004. This manual will explain every function of SPS screen by screen. It will be on-line in the BASS Library under the SPS reference desk (http://bass.ofm.wa.gov/basspr/library/sps.html). Full documentation on all BASS products are available in the BASS Virtual Library available on-line at http://bass.ofm.wa.gov/basspr/library/ or https://services-bass.ofm.wa.gov/basspr/library/ for Fortress users. The library may also be accessed via help links in the BASS applications.

LESSON 1 - PREPARE POSITION FILE

Lesson 1, Task 1 - Establish a Position File

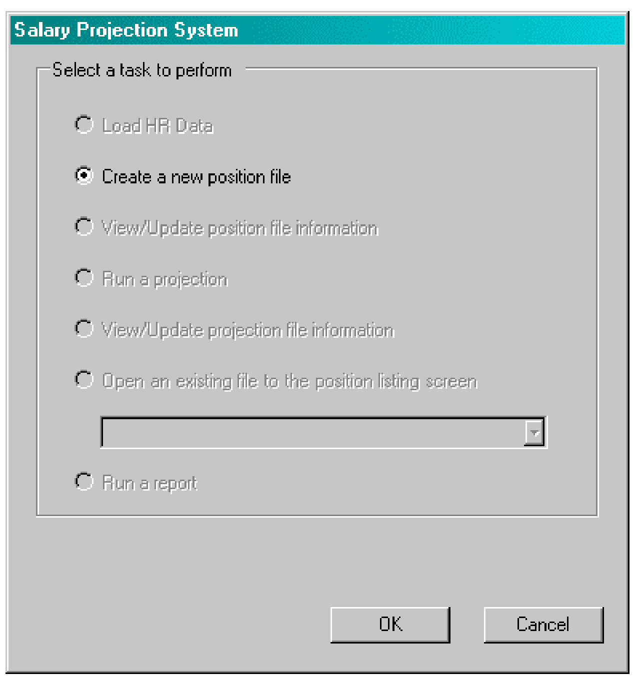
All positions are contained within individual position files. A file must be added prior to performing an HR Data Load or Copy. Position files are assigned an owner with the default as the person who added the file. Lesson 1, Task 4 contains more information on the description and details of a position file.

1. Login into BASS
   User ID – <Agency Number>00<First Name>
   10500trainer
   Password – <first name>
   Trainer

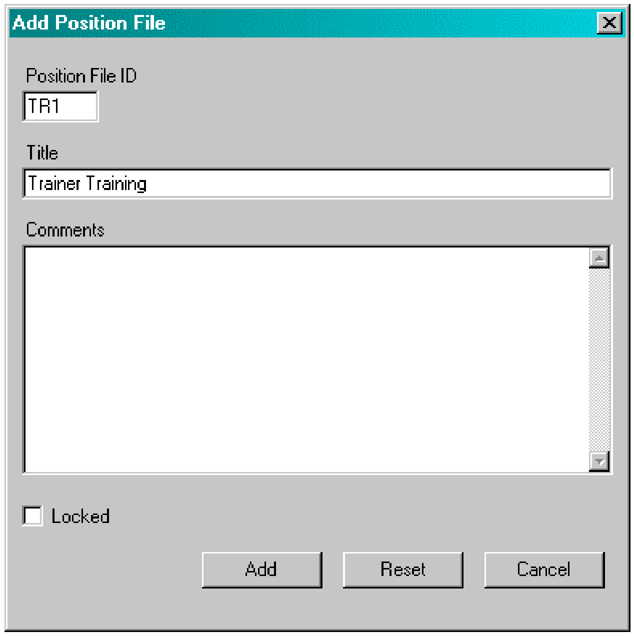
   Note: The password must be 5-characters. If the default password is less than five-characters, fill the remaining spaces with zeros (i.e., tra00)

2. Click on the SPS Icon to access SPS.

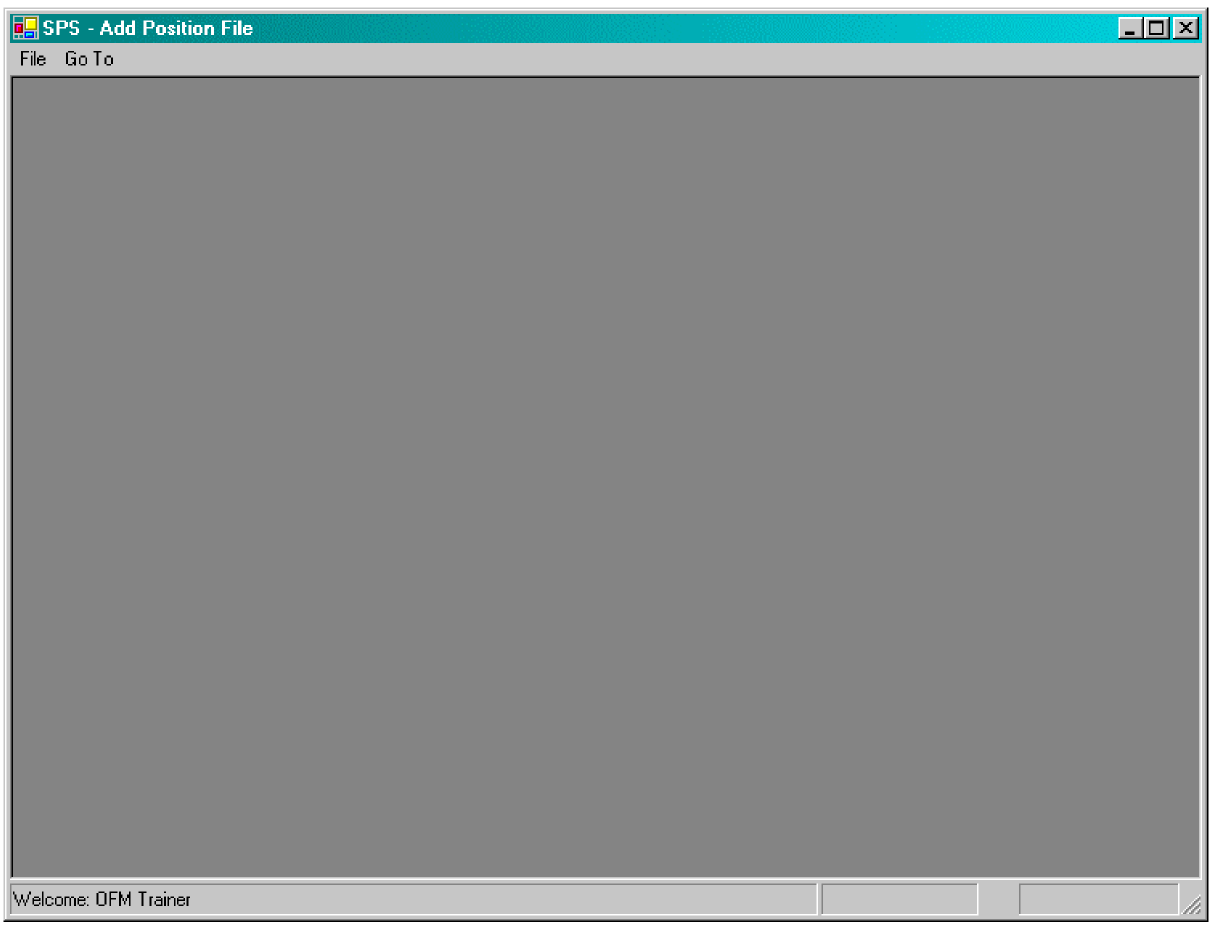
3. Select the option to **Create a new position file** from the dialog box and click OK. *Note: Only valid options are available in this dialog box. If your agency does not have any position files previously established, the only option available is to Create a new position file.*



4. Add a three character **Position File ID** and **Title** for this file and click **Add**.
   <your initials>1 - <your name> Training
   TR1 – Trainer Training



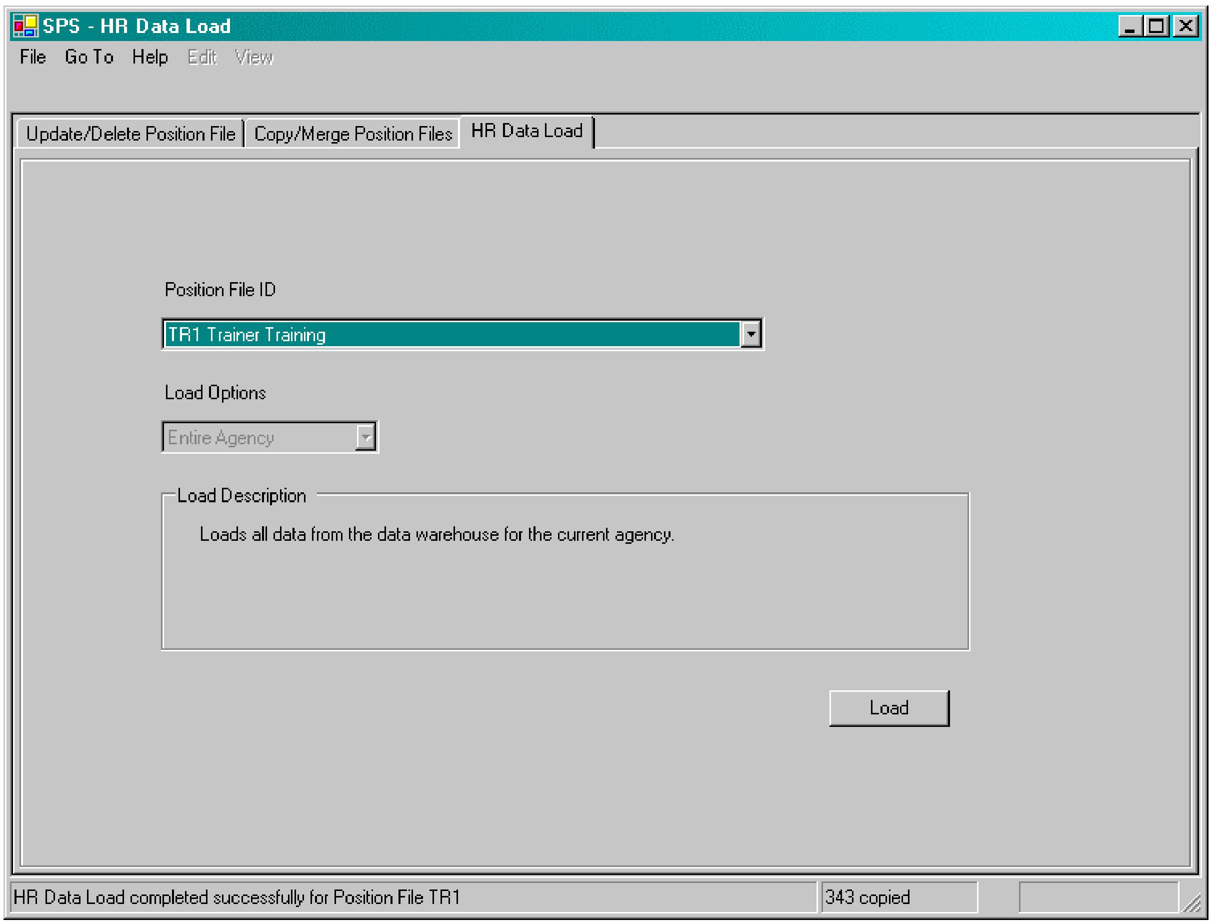
5. Click **Cancel** to close the Add screen.



Lesson 1, Task 2 – Load Data from the HR Data Warehouse

SPS gets its payroll data from the DOP Data Warehouse. The HR Data Load will pull all position records contained within the Data Warehouse for the agency. This includes vacant positions and abolished positions that although not used by the agency, have not been removed from the HRISD personnel/position data. There is currently no option to limit the amount of data retrieved from the HR Data Warehouse. The warehouse data is two days old at the time it is available to SPS. Positions that do not meet certain rules or data requirements will be flagged as invalid and not included in any projections. More information on these exception records is available in Lesson 2, Task 2.

1. Select **Go To / HR Data Load** from the SPS menu bar.



2. Select the newly added file in the **Position File ID** dropdown list box. *Note: You must first create a position file before you can load HR data. Only position files without any positions will be available.*
   <your initials>1 - <your name> Training
   TR1 – Trainer Training

3. Click the **Load** button. *Note: You will know the data has been loaded by watching the message in the lower left hand corner of the screen, the status bar.*

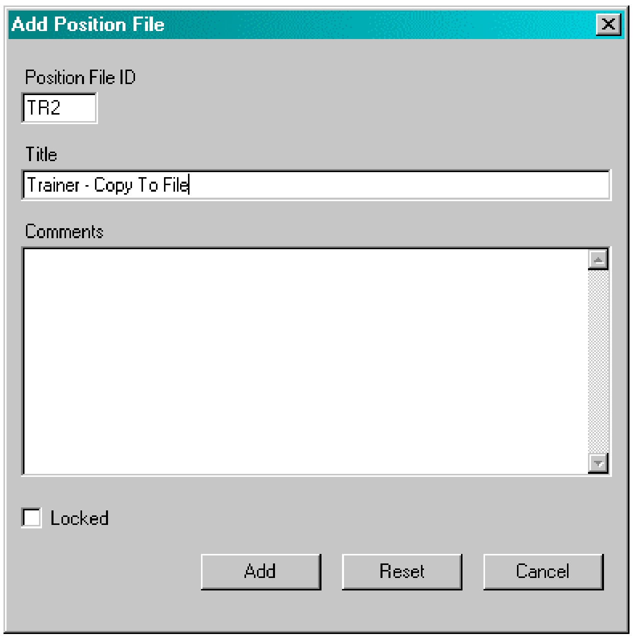
Lesson 1, Task 3 – Copy Positions for One Program to its Own File

Users can easily copy positions between position files in SPS. However, the position file to copy to must exist prior to the attempted copy.

SPS was developed with a multi-purpose filter that can be used here to limit the amount of data copied. The Filter is explored more in Lesson 2, Task 1.

If position data already exists in the Copy To file, merge options are available for the user to determine how they wish the system to handle.

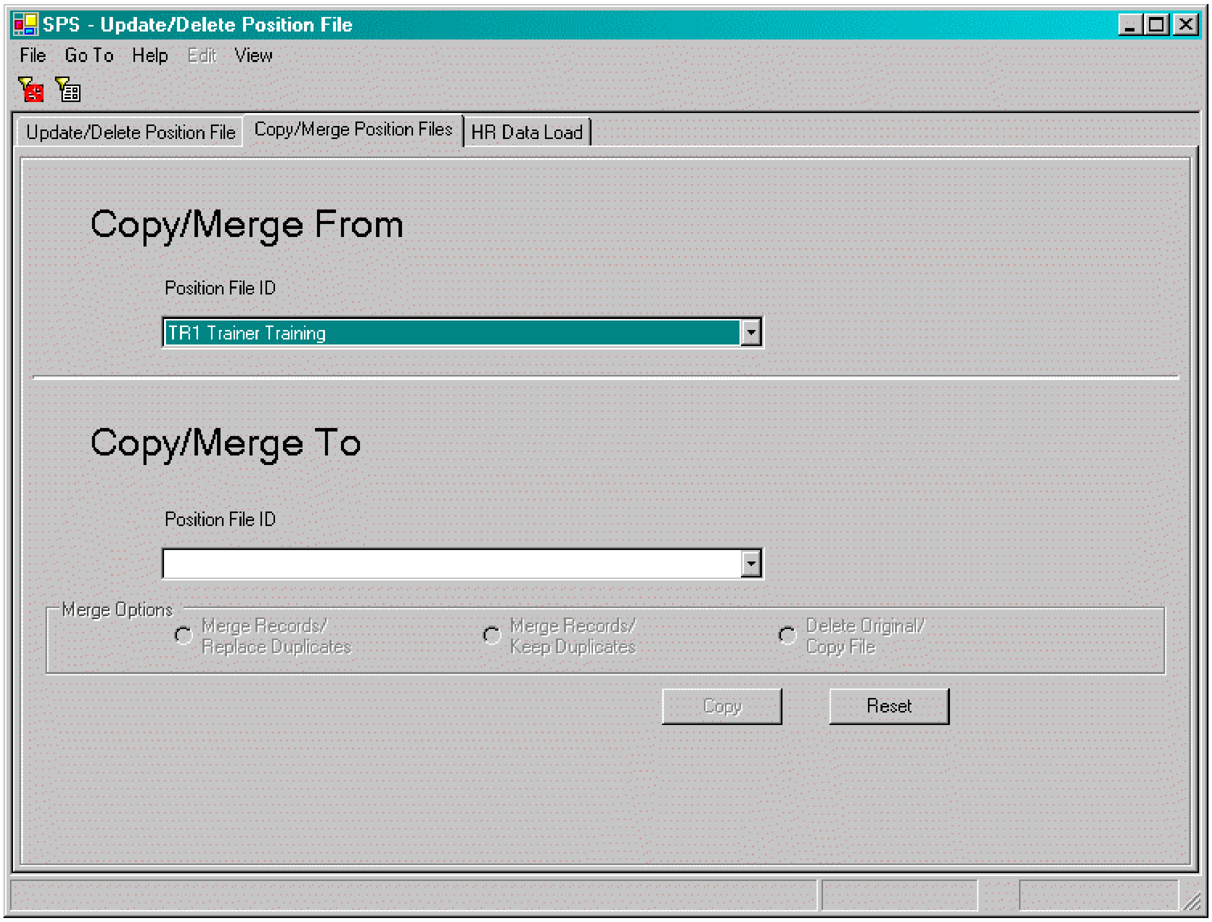
1. Select **Go To / Positions / Add Position File**. *Note: A position file must exist for you to copy.*



2. Add a new **Position File ID** and **Title** and click **Add**.
   <your initials>2 – <your name> - Copy To File
   TR2 – Trainer - Copy To File

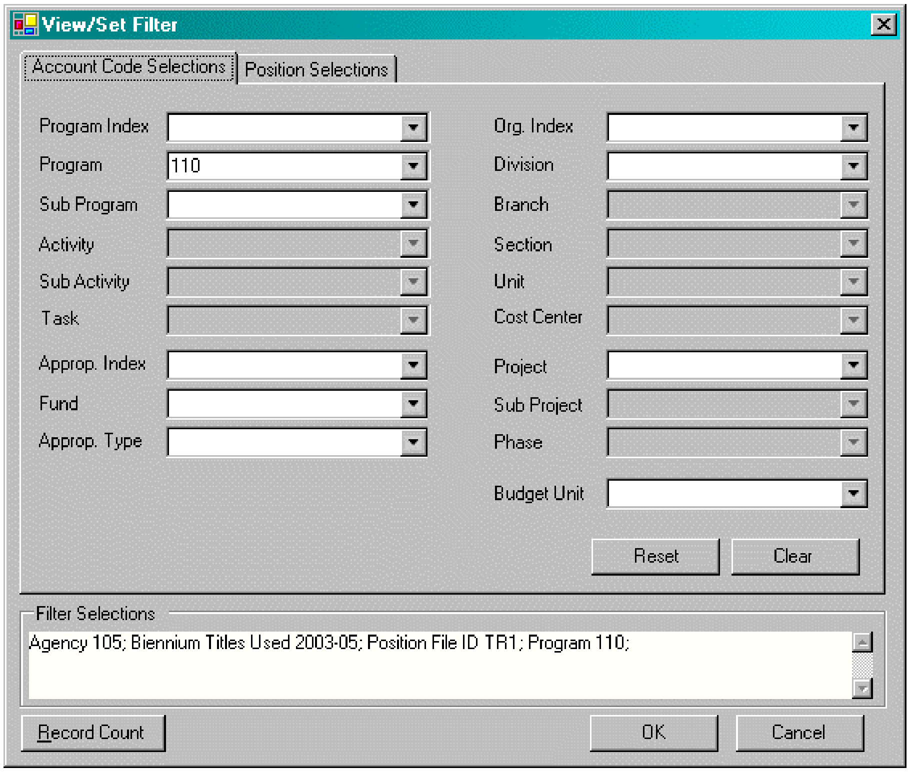
3. Click **Cancel** to close the Add screen.

4. Select **Go To / Positions / Copy/Merge Position Files**.



5. Select the file added in the first lesson from the **Copy/Merge From Position File ID** dropdown list box.
   <your initials>1 - <your name> Training
   TR1 – Trainer Training

6. Select **View / Set Filter** from the menu bar. 🕮 *Note: There is also an icon available on the tool bar for Set Filter. Hover your mouse over an icon to get text describing its function.*



7. Click the ▼ next to **Program** to bring up a list of agency programs. *Note: Programs listed are programs found in the selected position file.*

8. Double click to select a **Program** from the list on which you wish to base the copy.
<The program in your agency that you are coded to>
110 – Statewide Systems

9. Verify the **Filter Selections** text indicates the selected program. *Note: Always verify the Filter Selections registers your selections. Generally, you must tab off a cell before it gets picked up.*

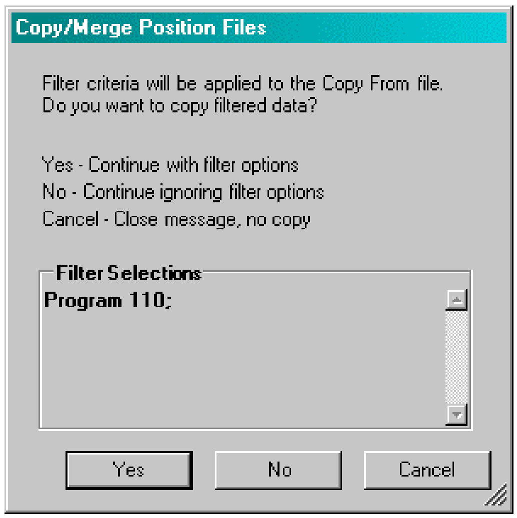
10. Click the **Record Count** button and note the number of Valid and Invalid Records listed. *Note: Valid Records indicate the number of records matching the filter criteria that are valid. Invalid is the number of records that were flagged as invalid on the HR Data Load. More information on invalid records is detailed in*

Lesson 2, Task 2 – Correct Exception (Invalid) Positions.

11. Click the **OK** button to apply the filter.

12. Select the file to copy filtered positions to in the **Copy/Merge To Position File ID** dropdown list box.
<your initials>2 – <your name> - Copy To File
TR2 – Trainer-Copy To File

13. Click the **Copy** button to copy the file.

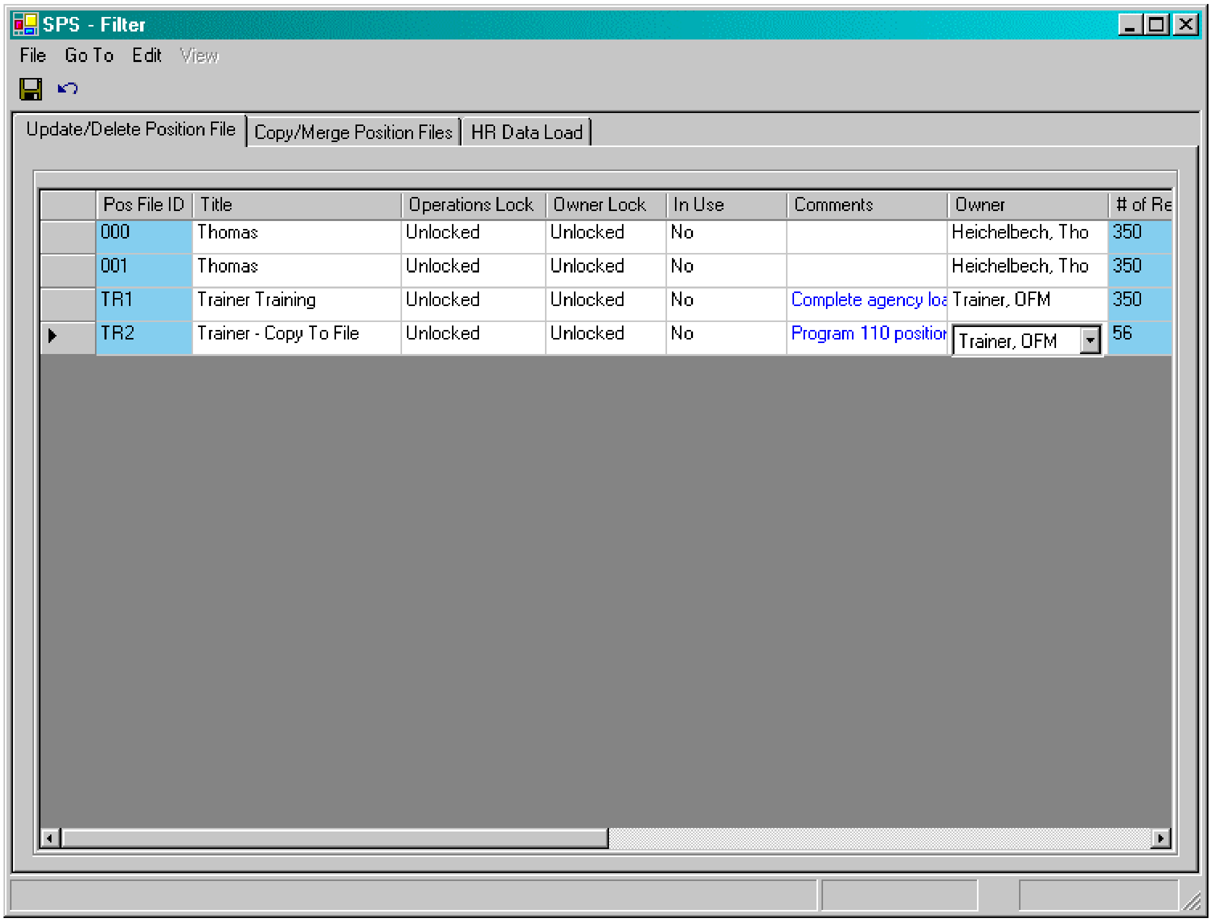


14. Verify the **Filter Selections** in the confirmation box and click **Yes** to continue. *Note: Click Yes to copy based on the filter options, or No to copy the entire file. Cancel will close the confirmation box, canceling the copy.*

Lesson 1, Task 4 – View/Update Position File Information

A lot of information about a position file is available in the Update/Delete Position File information screen. Items include number of records, number of exceptions, file owner, extract date, etc. This screen also allows users to lock position files, enter file comments, change file owner, clear in-use flags, or delete unlocked position files.

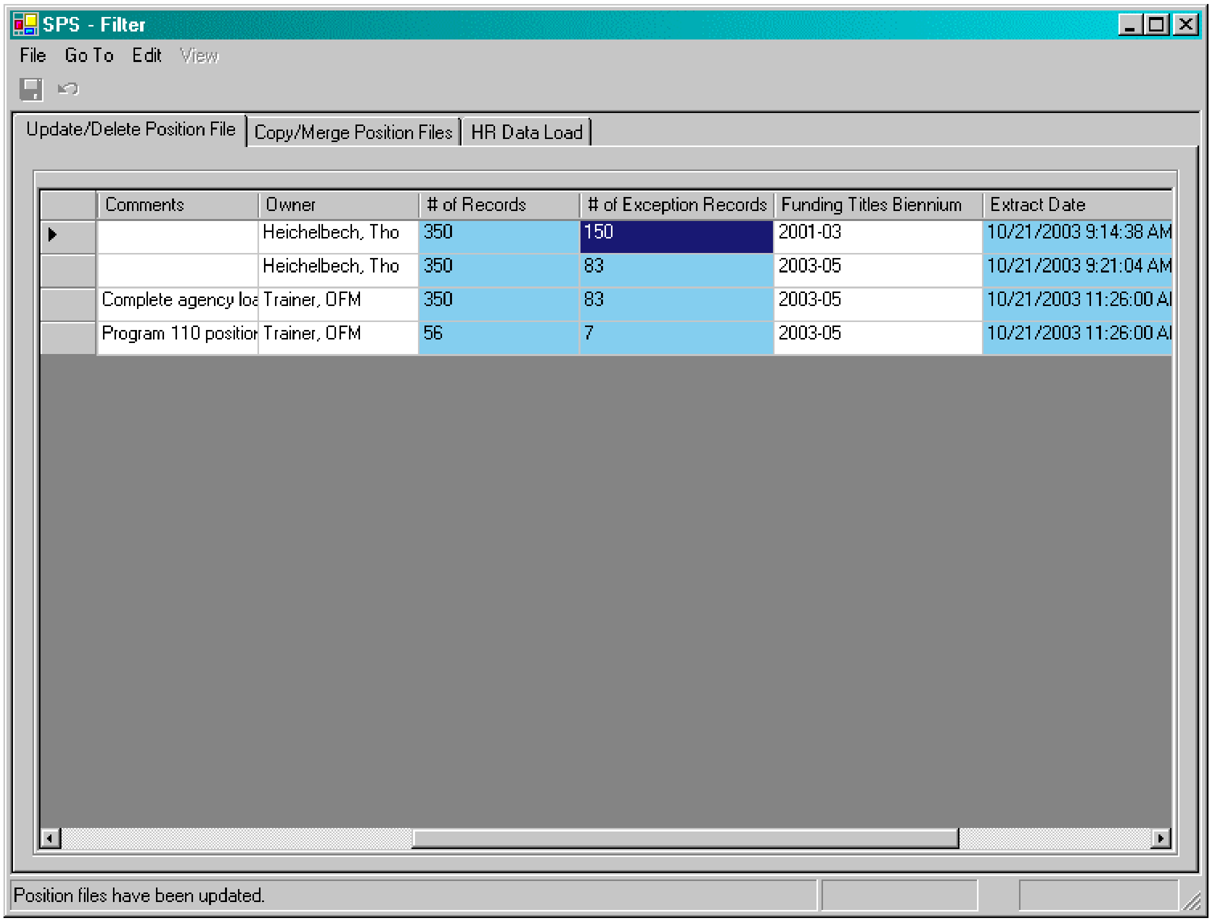
1. Select the **Update/Delete Position File** tab.



2. Enter appropriate comments for each of the two files you have entered in the **Comments** column.
   <your initials>1 - <your name> Training
   TR1 – Trainer Training
   “Complete agency data load on <today’s date>”

   <your initials>2 – <your name> - Copy To File
   TR2 – Trainer-Copy To File
   “Program XXX positions, copied from <your initials>1”

3. Scroll to the right and note the information available in each column.



4. Single click on a column heading to sort the list by that column.
   # of Records

5. Select **File / Save** from the menu bar or select the Save icon on the tool bar.

LESSON 2 – EDIT YOUR POSITION FILE

Lesson 2, Task 1 – View Positions in Position Listing (Includes Filter)

SPS allows users to see a listing of positions for any position file. By default, any records that have been flagged as invalid (or exceptions) will be presented to the user when loading a list of positions unless no exceptions exist.

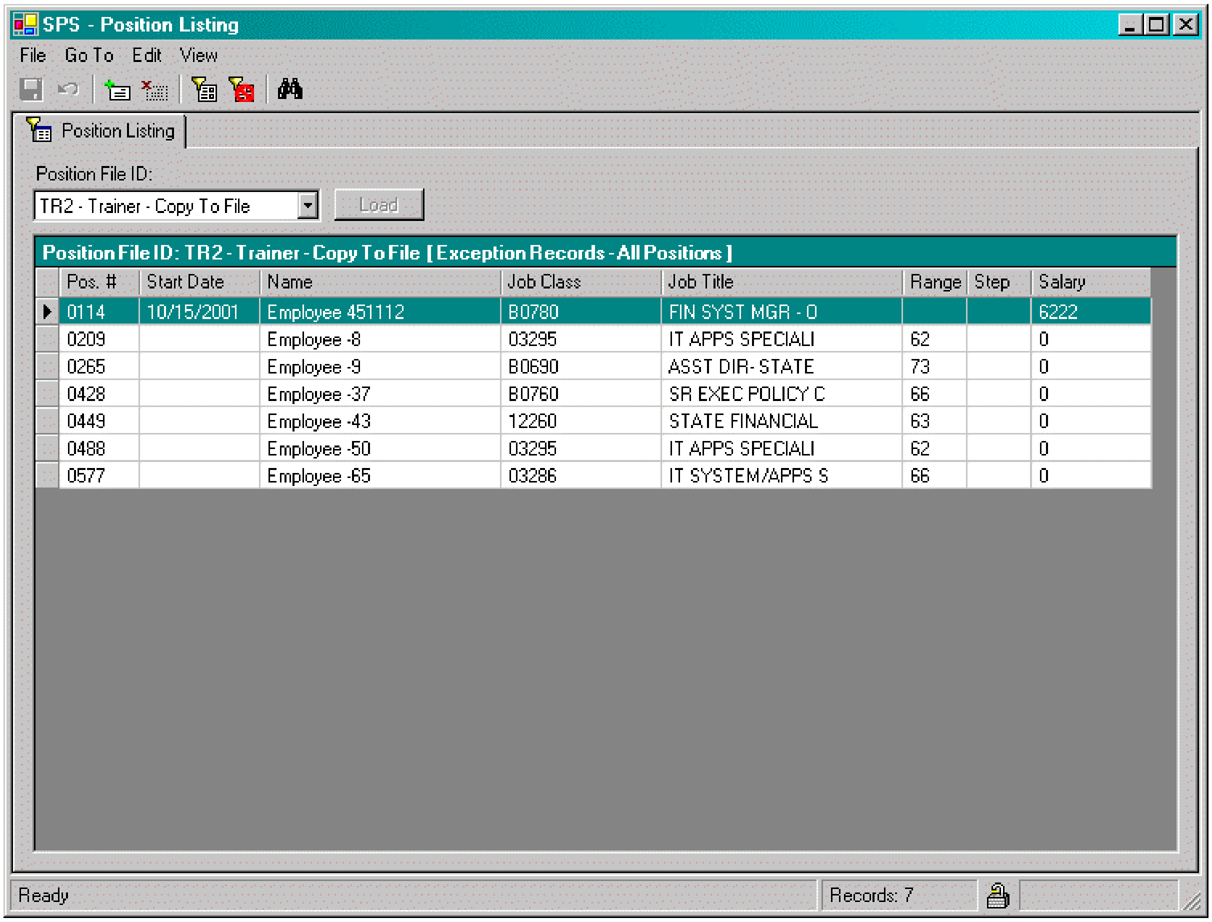
The common SPS Filter can also be used here to limit the number of records displayed. The list cannot load more than 2,000 records.

If you attempt to load more than 2,000 records, a message box will inform you this is not allowed and ask if you would like to go to the filter. The Record Count button on the filter will allow you to determine when you have met the less than 2,000 record requirement.

1. Select **Go To / Positions / Position Listing**.

2. Select a file from the dropdown list box to view, then click the **Load** button.
   <your initials>2 – <your name> - Copy To File
   TR2 – Trainer-Copy To File

   🕮 *Note: It will take longer to load this list the first time for the current session as SPS looks up information such as job classes and retirement systems.*



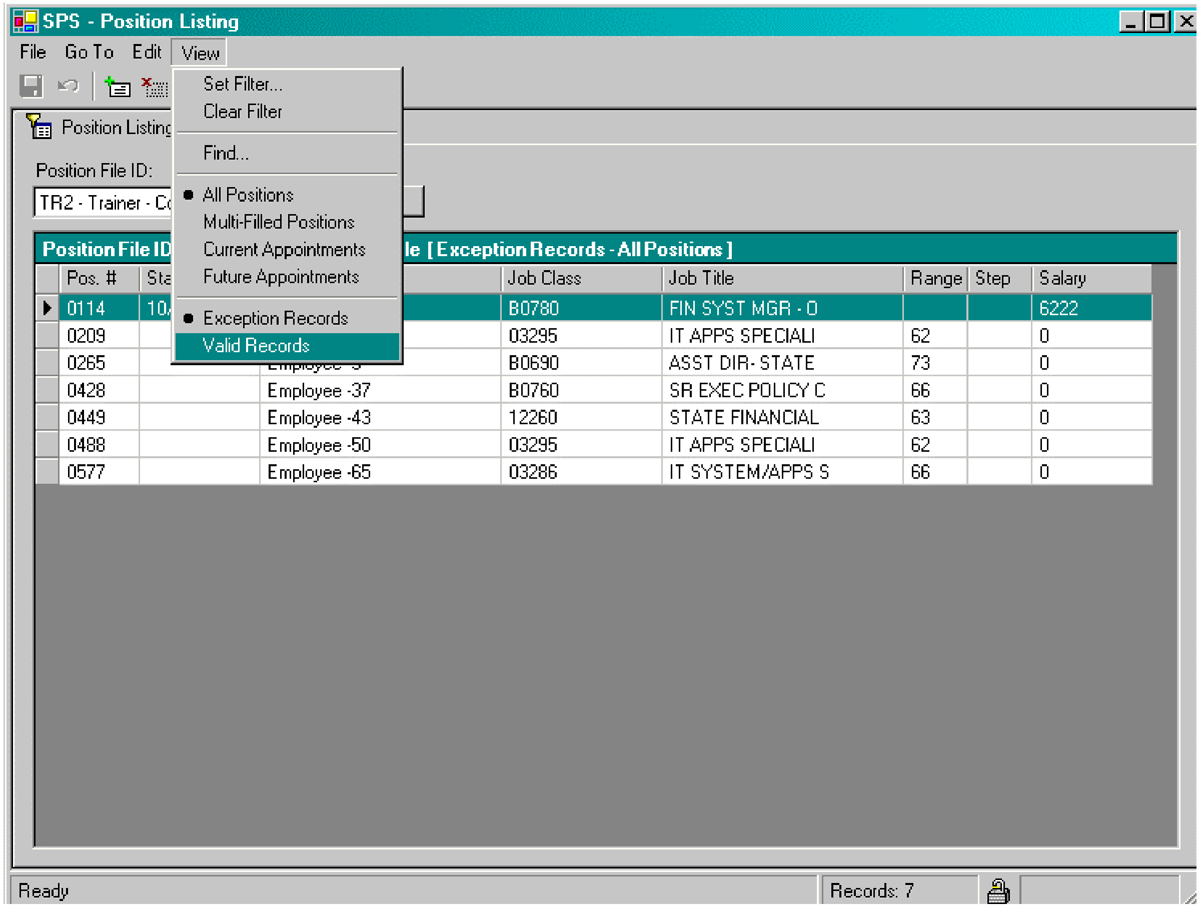
3. Note the header of the worksheet (grid). This will indicate the Position File you have loaded as well as information on the display. *Note: By default, position files will load displaying records marked with exceptions (invalid records) unless none exist*.

4. Note the icon in the Position Listing tab. This indicates a filter is applied to this listing. *Note: The filter set when copying position files remains in effect until you clear the filter or close the session. Clearing the filter at this point will not change the list since the list was the result of a copy based on the same filter. Clearing the filter will enable you to ensure you are looking at all positions of the position file.*

5. Select **View / Clear Filter** from the menu bar or the corresponding tool bar icon to clear the current filter.

6. Note the bottom of the screen for information such as the number of records displayed and the padlock. A closed padlock indicates the file is locked. An Edit Access user will not be able to save changes unless they are the owner of the file. Wait for the Status message in the lower left hand corner to finish loading before continuing. *Note: See **Update/Delete Position File** for information on the file owner, locks applied, or to change locks.*

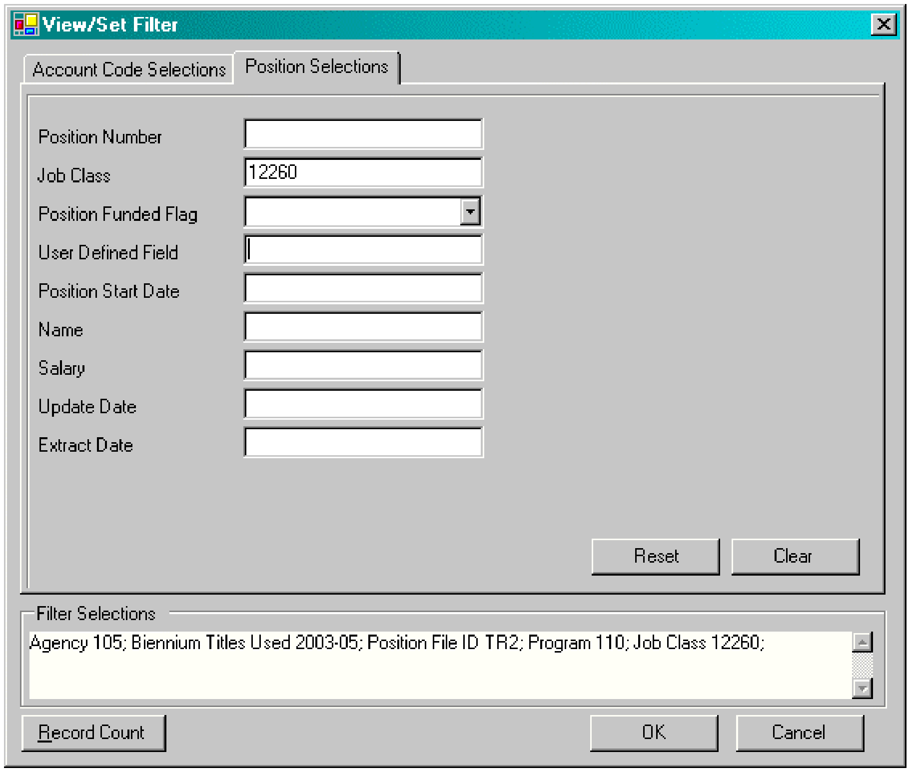
7. Select **View / Valid Records** to change the display to valid records. *Note: Other view options are available for your convenience; multi-filled positions, current appointments, future appointments.*



8. Note a job class number that has more than one position and write it down for later reference.

____

9. Select **View / Set Filter** and select the **Position Selections** tab.



Enter the **Job Class** code noted at step 8 in the Job Class field and hit tab. *Note: The filter can search on a number of options (e.g., Program and Job Class) as long as the selections do not get too complex. The below examples are valid search options. These are generally available throughout the filter depending on the data type:*

- *Job Class - **12*** (returns all job classes that begin with 12)*
- *Job Class - **120?1** (returns all job classes where the first three-characters are 120 and the last character is 1 regardless of what the fourth-character is)*
- *Job Class - **=** (returns all job classes where the job class code is blank)*
- *Job Class - **12000-12040** (returns all job classes within the range of 12000-12040)*
- *Job Class - **12010, 12020, 12030** (returns all job classes matching 12010, 12020, or 12030 (maximum of five values per field is allowed).*
- *Salary - **> 2000** (returns all records where the salary is greater than $2,000. < and <> are also allowed)*
- *Name - **Ove*** (returns all records where the name as displayed begins with "ove". By default HR data loads Last Name, First Name. The only option to search on name is to enter the first part of the name as displayed and enter * at the end. Spaces and commas are not allowed).*

10. Ensure the **Job Class** entered is listed in the **Filter Selections** text and click the **Record Count** button to see the number of records with that job class.

11. Click **OK** to apply the filter and return to the Position Listing. *Note: You can filter on any combination of account code or available position options (i.e., all Secretary Admin with a position start date greater than 7/1/2003 in program 010 with appropriation index 011).*

12. Pick the Position File that you originally loaded HR data into and load into the position listing.
<your initials>1 - <your name> Training
TR1 – Trainer Training

13. Clear the filter (unless you received the 2,000 record message in the step above) and select **View / Valid Records**. 🕮 *Note: If the unfiltered data results in more than 2,000 records, the system will prompt you to go to the Filter to limit the selections. SPS cannot load more than 2,000 in the Position Listing. Select the option to filter your data if you receive this warning.*

14. Click on the header of the **Name** column to sort the list by name. This sort option is available for all columns of the **Position Listing**.

15. Select **View / Multi-Filled Positions**. 🕮 *Note: All position numbers that have more than one record will be displayed with the Multi-Filled Positions options. If one instance of the multi-filled is an exception record and the other instance is a valid record, the two records will be displayed once in their respective valid or exception list.*

16. Take 10 minutes to try applying various different filters and play with various view options and note any questions.

NOTES:

Lesson 2, Task 2 – Correct Exception (Invalid) Positions

Position records that do not meet certain business or data rules get flagged as invalid (or exception records). By default the position list loads with any exception records found. Within the Position Detail of each record is an explanation of the error that resulted in the flag. Appendix 2 of this document contains a listing of all possible errors and recommended resolutions. All vacant positions will come across as an exception since information vital to calculating a projection is missing. Exception positions will not be included in any projections. It is necessary to correct all errors for positions that are needed to adequately represent projection results.

1. Load the **Position File** that you copied filtered data into in Lesson 1, Task 3.
   <your initials>2 – <your name> - Copy To File
   TR2 – Trainer-Copy To File

2. Verify in the worksheet heading that you are viewing Exception records and the Status bar that the files has completed loading.

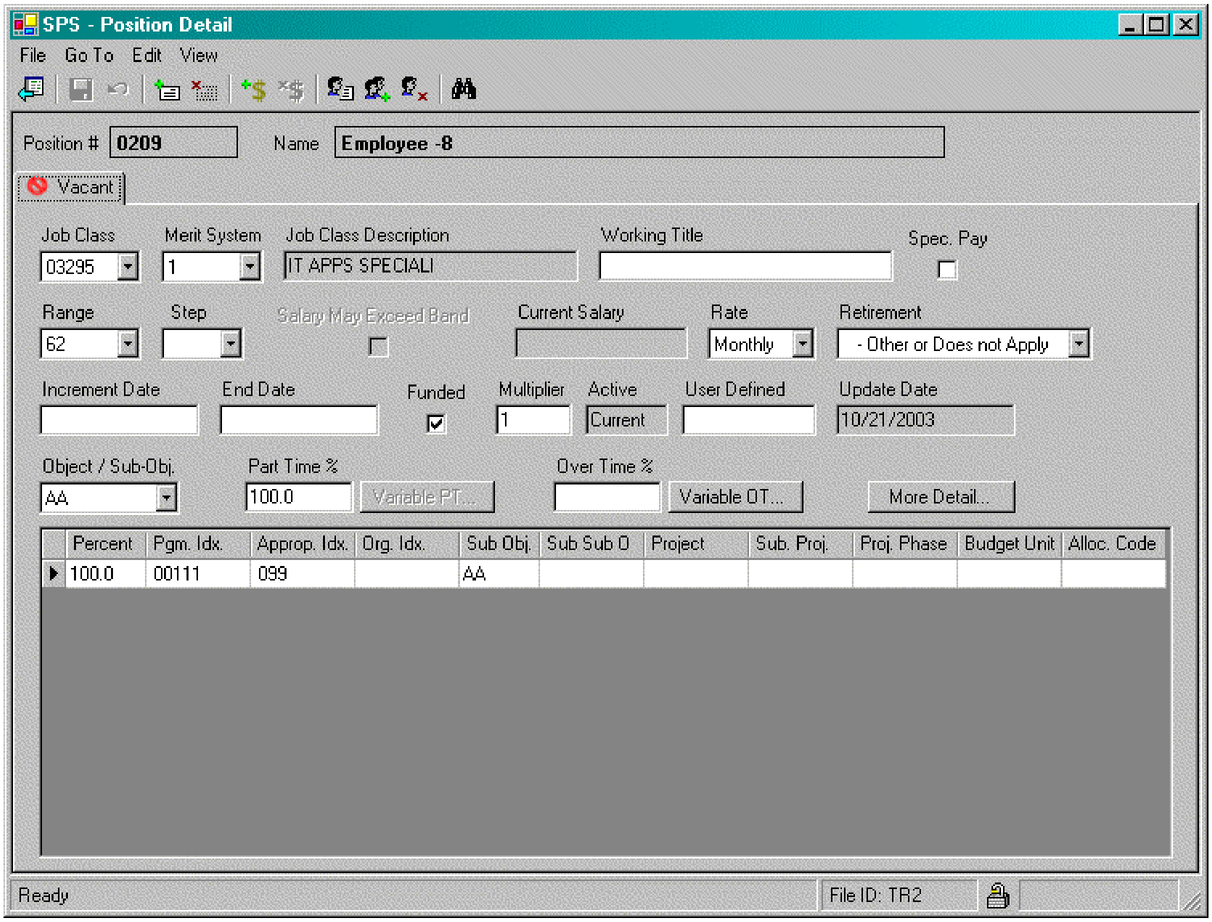
3. Select the **Clear Filter** option if available.

4. Change the View options as necessary to display **Exception Records - All Positions**.

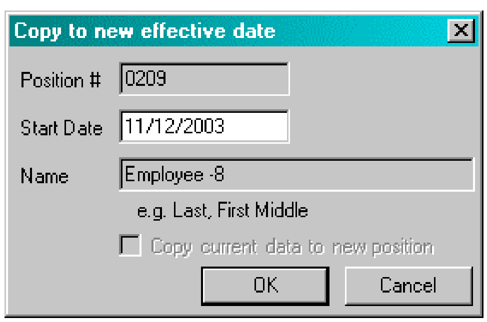
UPDATE A VACANT POSITION TO CLEAR EXCEPTION & PROJECT SALARY

5. Identify a position that is currently vacant that should be retained for projection purposes.
   Note: Vacant positions are always loaded as exception records since certain data elements are missing.
   Pick the first classified position (position with a salary range) with a blank Start Date

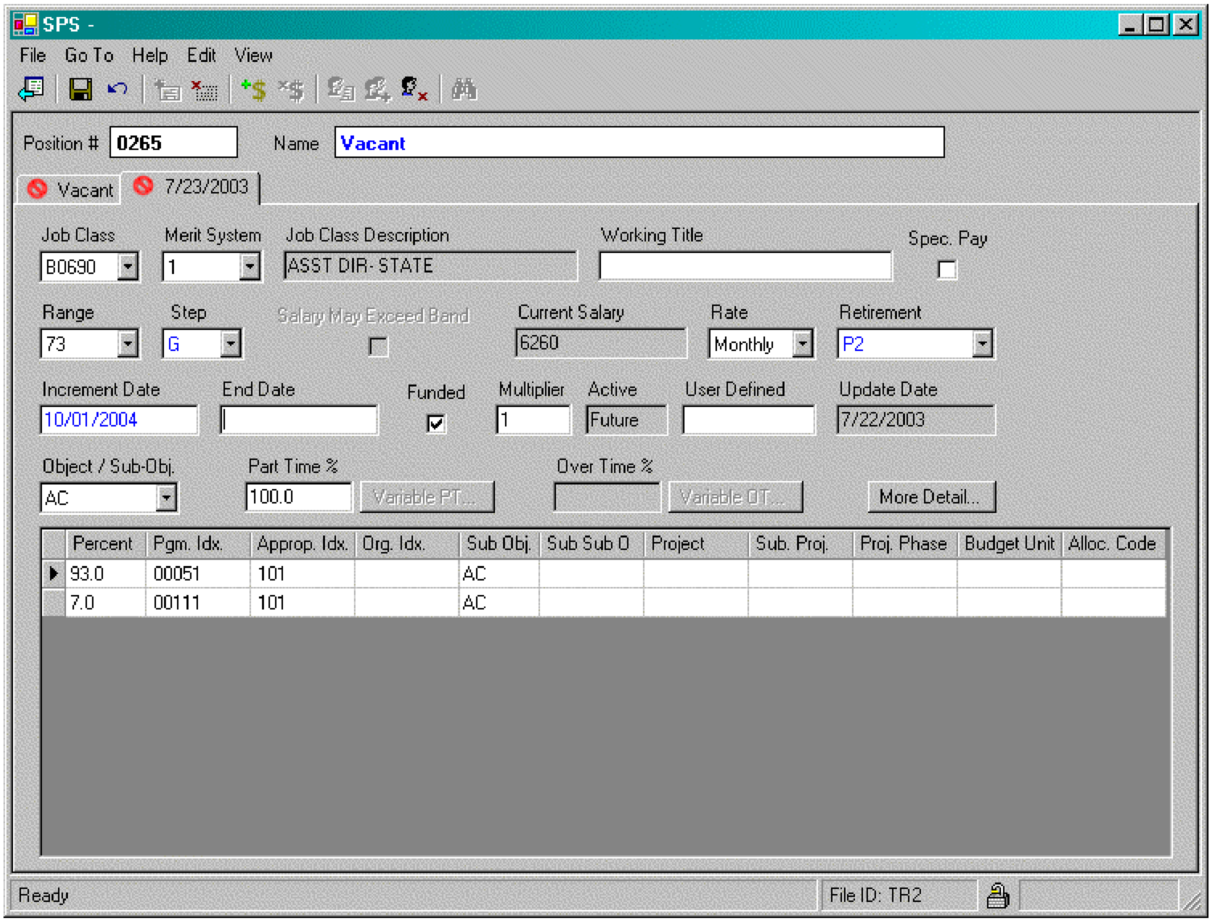
6. Double click to open to the **Position Detail** for the selected position.



7. Select **Edit / Copy to New Effective Date** and enter today’s date in the appropriate field and click OK. 🕮 *Note: The system will warn you to check start and end dates on all positions affected.*
<Today’s Date>
11/12/2003



8. Select **Edit / Update Position #** and **Name** from the menu bar.

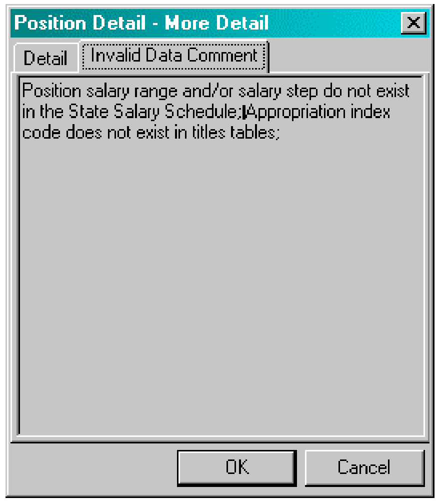


9. The **Name** field should now be available for entry. Enter "Vacant" for the name. 🕮 *Note: Changed fields turn blue to indicate that a change has been made but not yet saved.*
   Vacant

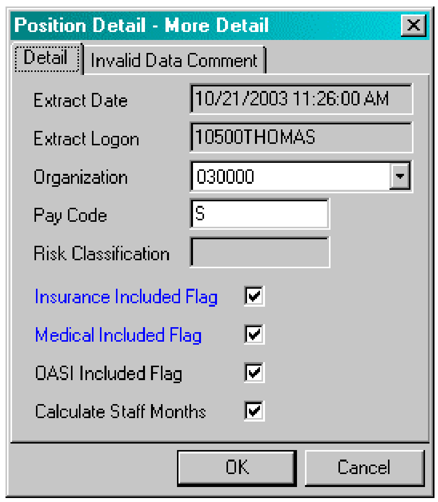
10. Select a **Step** from the dropdown list box that you want to use for estimating the salary.
    Step G

11. Select a **Retirement System** and an **Increment Date** for this position to use for projection purposes.
    P2 – PERS2
    7/1/2004

12. Click on the **More Detail** button and select the **Invalid Data Comment** tab to view information on the errors for the position and note if there are any errors not corrected by the previous steps.



13. Click on the **Detail** tab of the dialog box to view other position information.



14. Click to check **Insurance Included Flag** and **Medical Insurance Flag** to ensure all benefits will be projected for this position.

15. Click **OK** to close the **More Detail** box.

16. Make changes to the position detail to correct the **Invalid Data Comment** listed in step 12. *Note: A complete listing of possible Invalid Data Comments and the suggested resolutions are contained in Appendix II of this tutorial.*
All errors listed should have been cleared with steps 10 and 11 above. If other errors are listed make the required changes prior to proceeding.

17. Select **File / Save Changes** to make required changes. *Note: The tool bar also contains a save option.*

18. Click on the first tab and verify the end date is correct for the first instance of this position. *Note: SPS will enter the day prior to the new effective date as the end date on the original position by default.*

19. Click the first icon labeled **Back to Position Listing** to return to the list of positions.

20. Repeat for each vacant position that should be included in projections.
    Update the next three vacant positions

CORRECT EXCEPTION ERRORS FOR FILLED POSITIONS

21. Select a position from Position Listing exceptions view that is filled.
    The first position with an employee name associated with it

22. Click the **More Detail** button and the **Invalid Data Comment** tab to determine what the error on the position is and **Cancel** to close the **More Detail** box.

23. Update the position to correct listed errors and save changes.
    Go to page 57 to find explanations of exceptions and the remedy. Look for instances of these exceptions in your data and correct as indicated.

24. Click the first icon labeled **Back to Position Listing** to return to the list of positions.

25. Repeat for each position in the exception list that is filled.
    Go to page 57 to find view the list of exceptions. Look for instances of these exceptions in your data and correct as indicated for up to 5 records in your agency.

26. At this point the positions remaining on the list should be abolished, vacant positions.
    Assume the remaining exception records are abolished positions and proceed to the next task for training/practice.

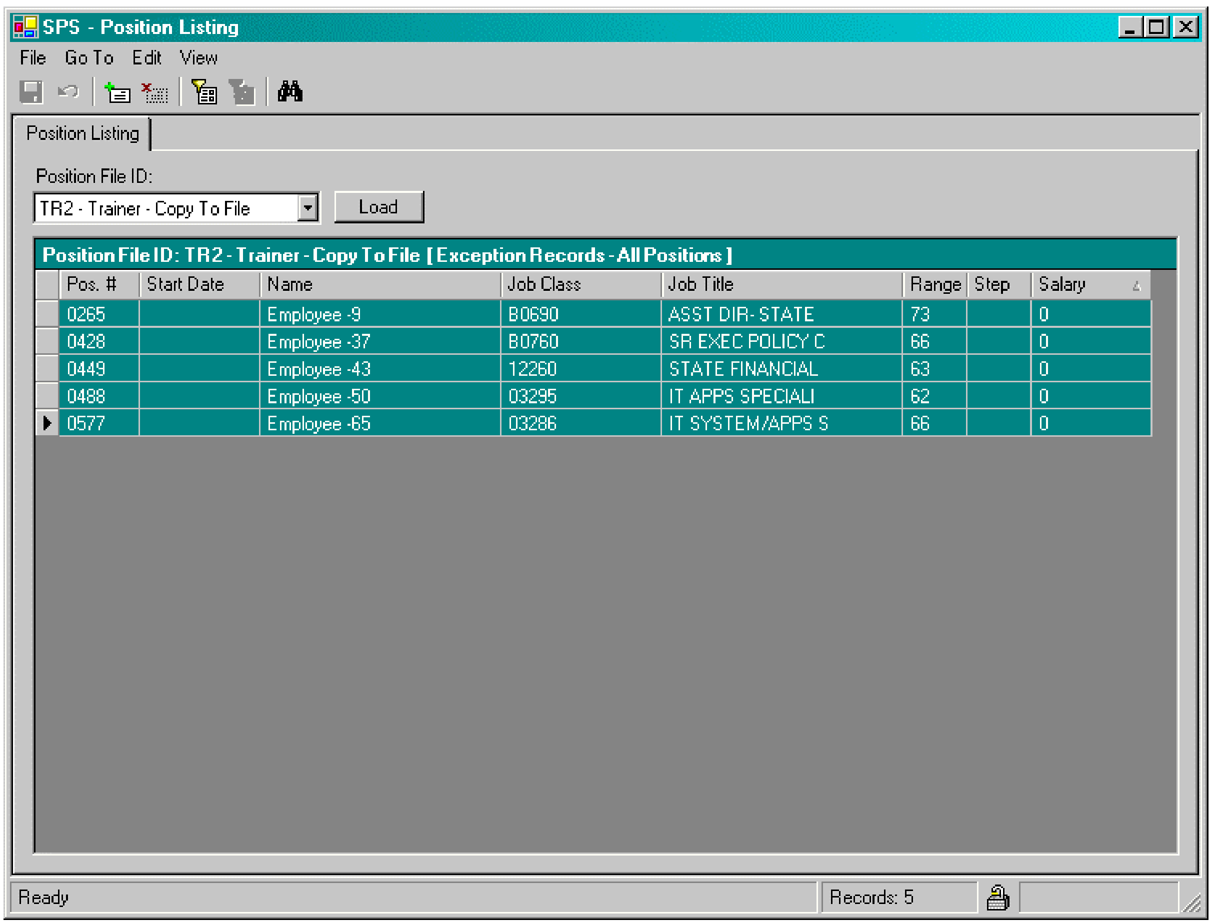
Lesson 2, Task 3 – Delete Extra Positions

Once you have corrected all the known errors in needed positions, any remaining exception position records can be deleted. However, since exception records are not calculated in projections, this step is not necessary to ensure accurate projections from the file. It will help in navigating through your file to delete all remaining exception records. This task assumes all remaining exception records represent abolished positions and should be deleted.

1. Select the first row by clicking your mouse in the gray box before the position number.

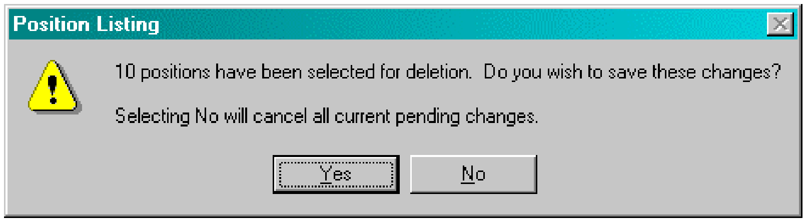
2. Hold the **Shift key** and select the last row by clicking your mouse in the gray box before the position number. 🕮 *Note: You can use the **Ctrl key** to pick various positions in the list without picking the positions in between the selections*.

3. All positions in the list should now be highlighted.



4. Selected **Edit / Delete Selected Position(s)** from the menu bar. 🕮 *Note: You can select to delete positions by using the Delete icon in the tool bar.*

5. Select **File / Save** from the menu bar to permanently delete the positions.

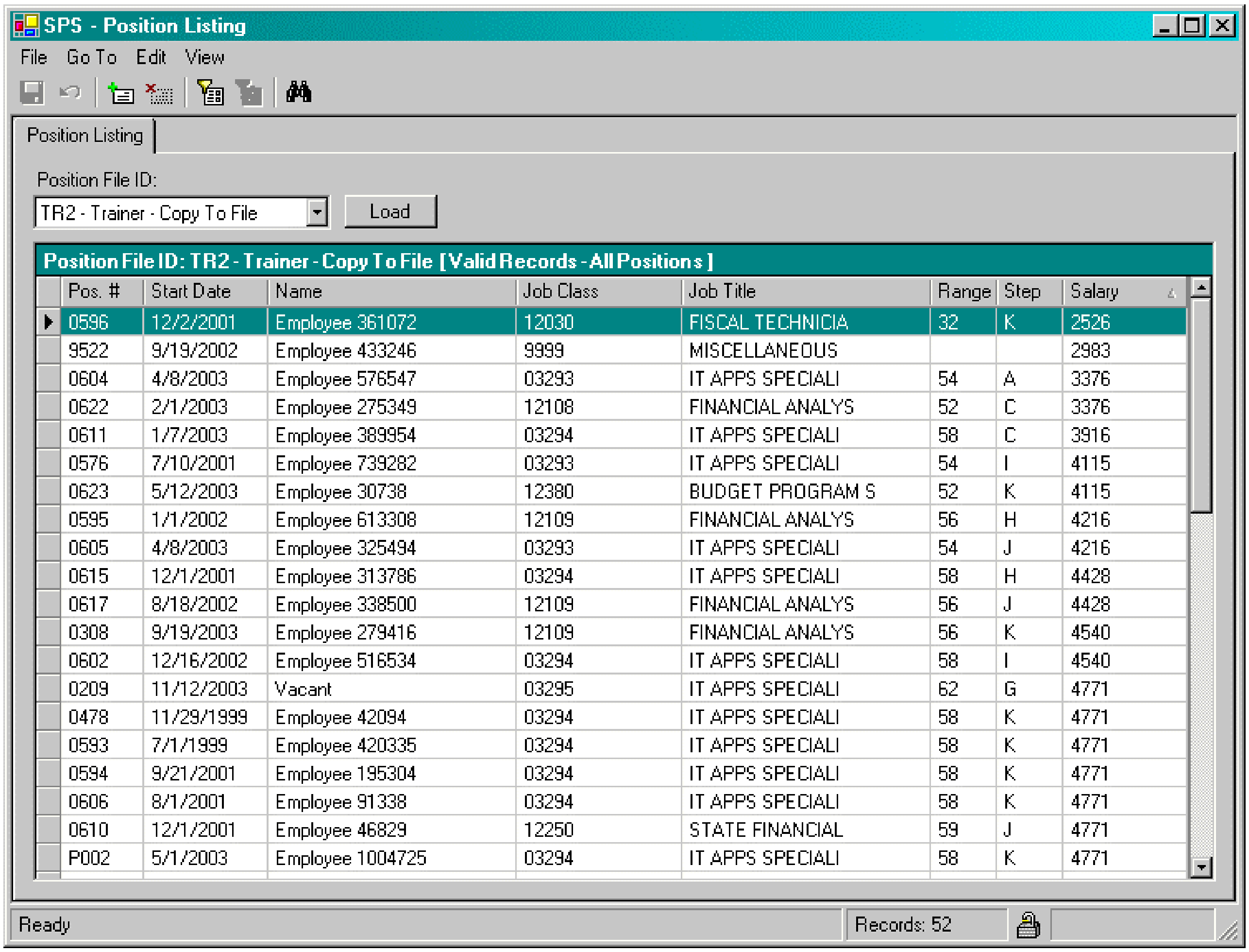


6. Review the confirmation box to ensure you are deleting the correct number of positions and click **Yes** to continue.

Lesson 2, Task 4 – Update Positions to Reflect Known Changes

At this point all records will be valid and available for projection. This task will walk you through various other types of adjustments that are common to positions in order to accurately project salaries and benefits given known changes in your organization.

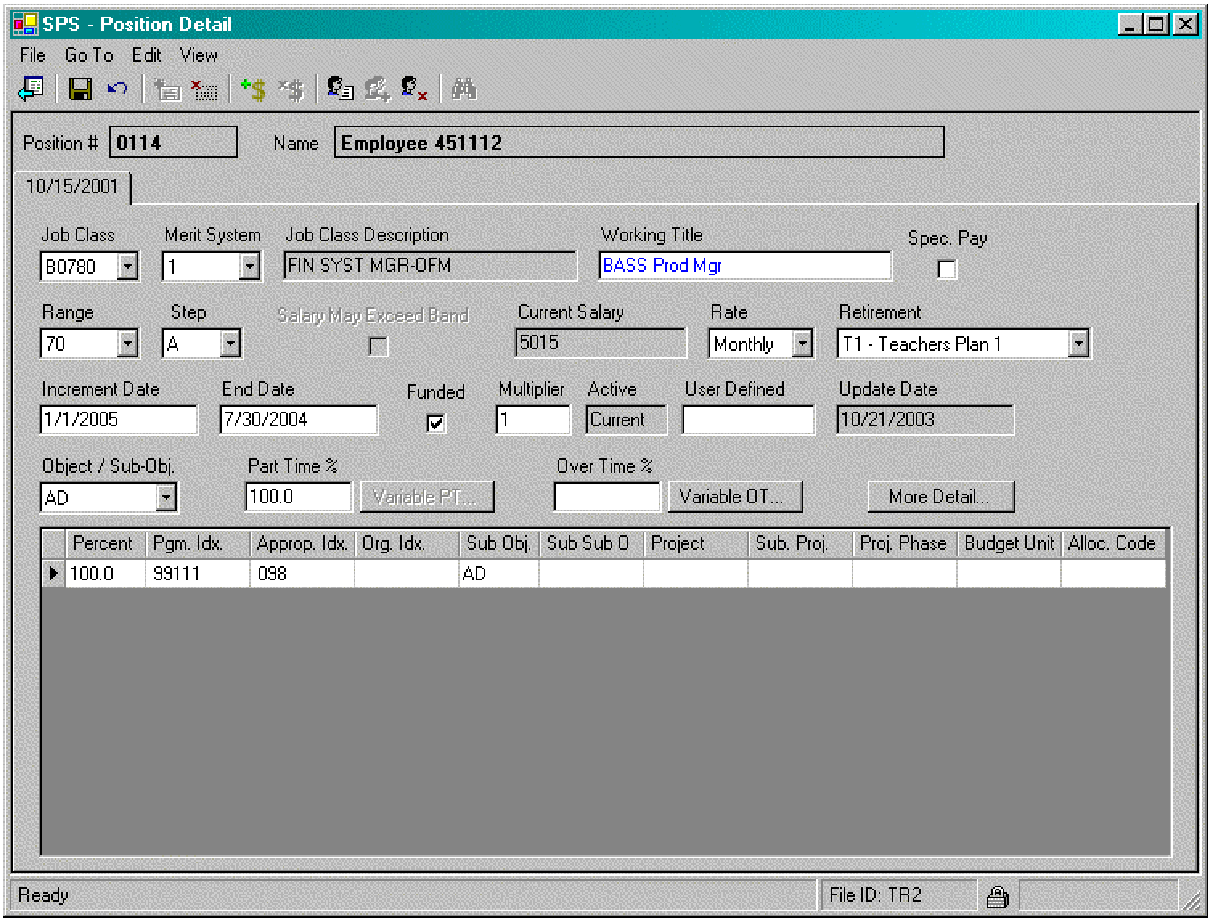
1. Select **View / Valid Records** to view only valid records for the position file.



Pos. #	Start Date	Name	Job Class	Job Title	Range	Step	Salary
0596	12/2/2001	Employee 361072	12030	FISCAL TECHNICIA	32	K	2526
9522	9/19/2002	Employee 433246	9999	MISCELLANEOUS			2983
0604	4/8/2003	Employee 576547	03293	IT APPS SPECIALI	54	A	3376
0622	2/1/2003	Employee 275349	12108	FINANCIAL ANALYS	52	C	3376
0611	1/7/2003	Employee 389954	03294	IT APPS SPECIALI	58	C	3916
0576	7/10/2001	Employee 739282	03293	IT APPS SPECIALI	54	I	4115
0623	5/12/2003	Employee 30738	12380	BUDGET PROGRAM S	52	K	4115
0595	1/1/2002	Employee 613308	12109	FINANCIAL ANALYS	56	H	4216
0605	4/8/2003	Employee 325494	03293	IT APPS SPECIALI	54	J	4216
0615	12/1/2001	Employee 313786	03294	IT APPS SPECIALI	58	H	4428
0617	8/18/2002	Employee 338500	12109	FINANCIAL ANALYS	56	J	4428
0308	9/19/2003	Employee 279416	12109	FINANCIAL ANALYS	56	K	4540
0602	12/16/2002	Employee 516534	03294	IT APPS SPECIALI	58	I	4540
0209	11/12/2003	Vacant	03295	IT APPS SPECIALI	62	G	4771
0478	11/29/1999	Employee 42094	03294	IT APPS SPECIALI	58	K	4771
0593	7/1/1999	Employee 420335	03294	IT APPS SPECIALI	58	K	4771
0594	9/21/2001	Employee 195304	03294	IT APPS SPECIALI	58	K	4771
0606	8/1/2001	Employee 91338	03294	IT APPS SPECIALI	58	K	4771
0610	12/1/2001	Employee 46829	12250	STATE FINANCIAL	59	J	4771
P002	5/1/2003	Employee 1004725	03294	IT APPS SPECIALI	58	K	4771

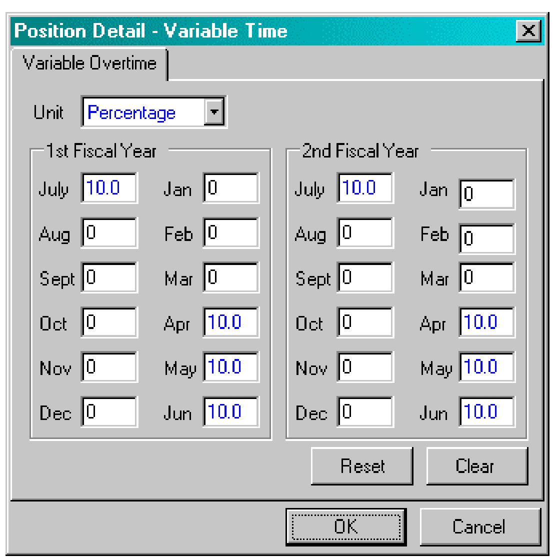
UPDATE A POSITION

2. Double click the first position in the list to open to the **Position Detail.**



3. Update the **Working Title** to reflect a more descriptive title for the position.
   BASS Prod Mgr

4. Click the **Variable OT…** button.



5. Select a **Unit** of **Percentage** and enter the appropriate percent of overtime in the appropriate months. 🕮 *Note: The Overtime field on the Position Detail screen can be used when overtime is assumed to be consistent across all months of the biennium.*
   10% in April, May, June, and July of both fiscal years

6. Click **OK** to apply the overtime and close the dialog.

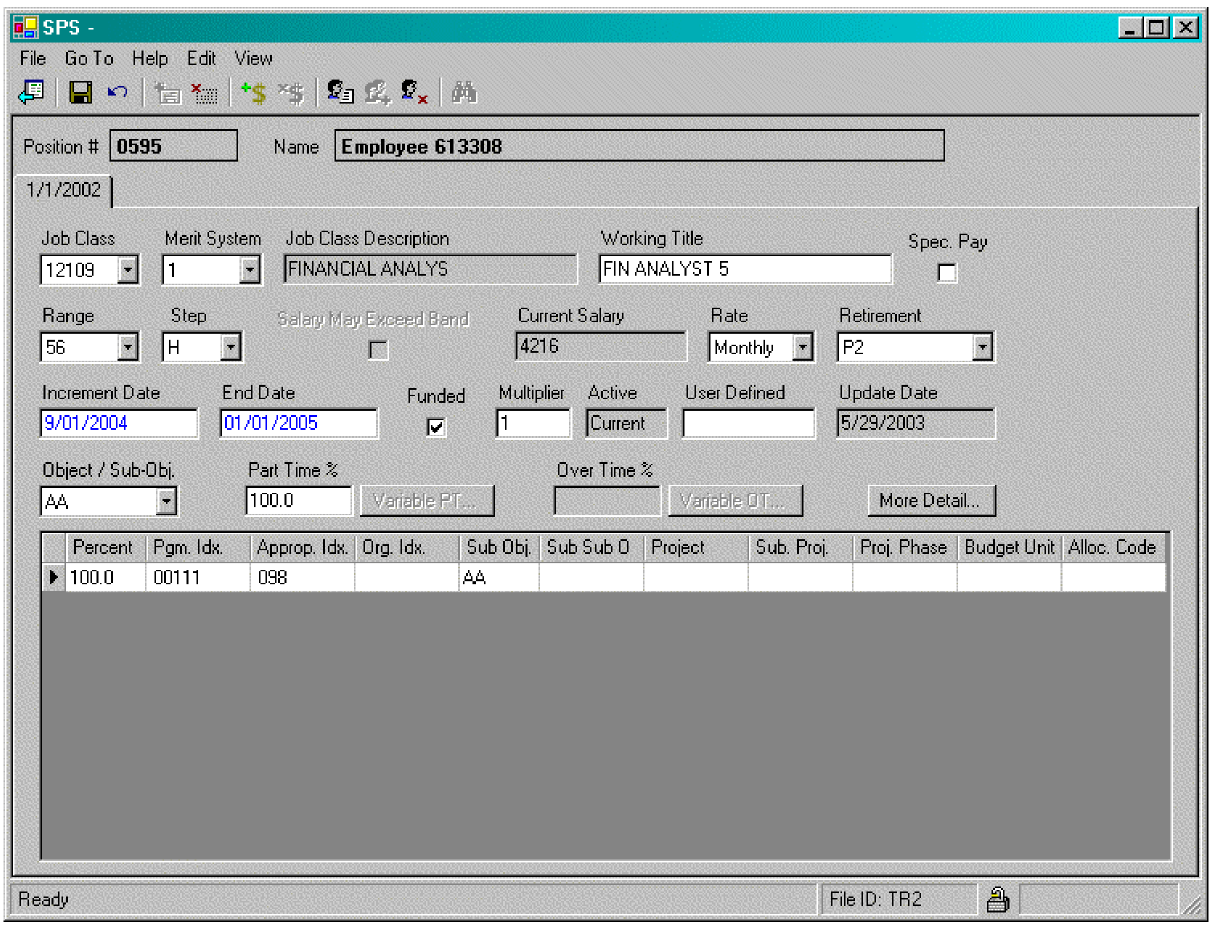
7. Change the **Pgm. Idx.** (Program Index) for the position and tab off the field. 🕮 *Note: Fund coding changes are not recognized until you first tab off of the field.*
Select the third program index in the list

8. **Save** changes. 🕮 *Note: The changes listed above are assumed to be effective for all projections. If you need to show an ending point for a projection and a beginning point for a different projection, you will need to end the current position and add a new position or use the* ***Copy to new effective date*** *option described below starting at step 13.*

9. Click the first icon, **Back to position listing**, to return to the list.

END A CURRENTLY FILLED POSITION

10. Double click the next position in the list to open to the **Position Detail**.

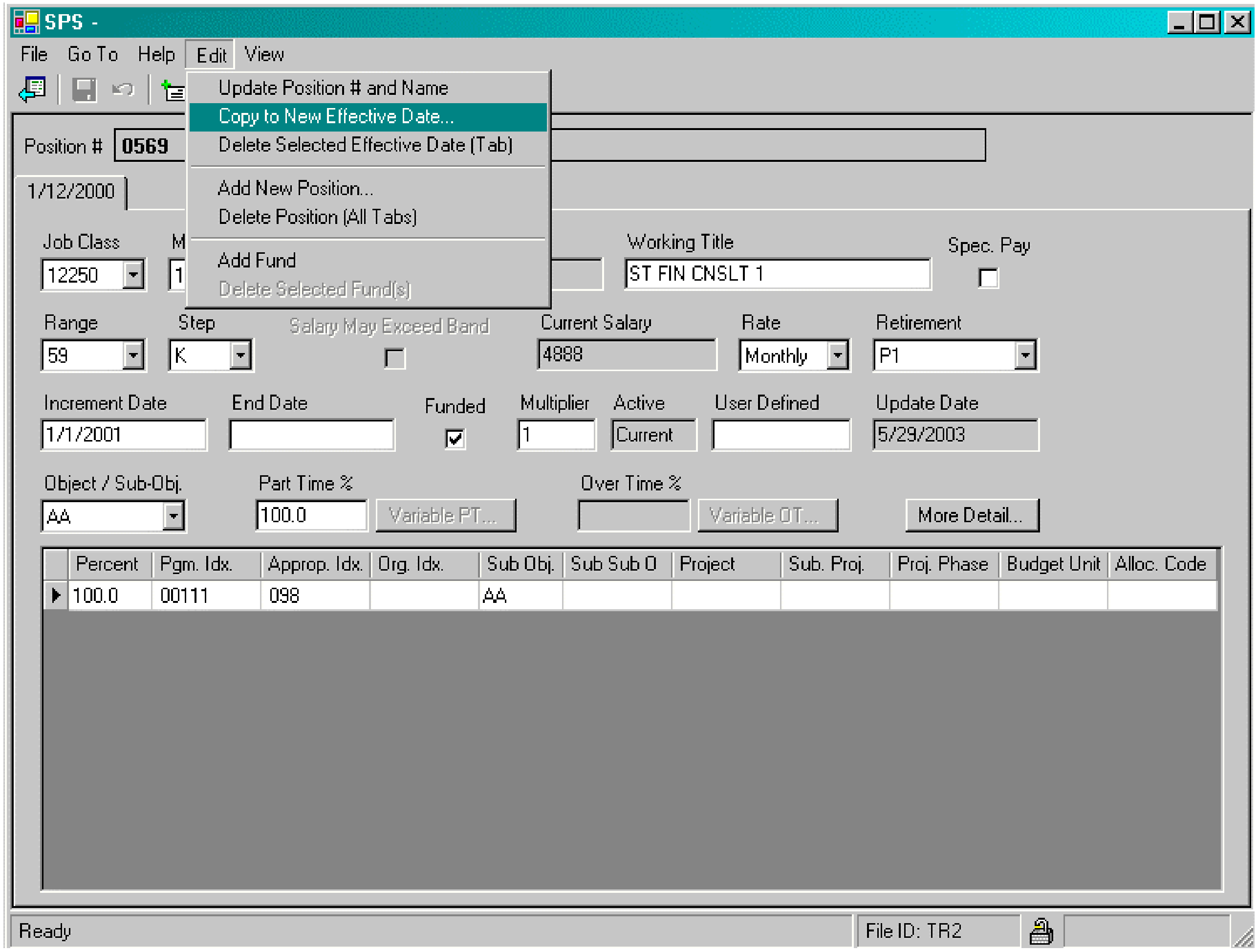


11. Enter an **End Date** for the position and **Save**.

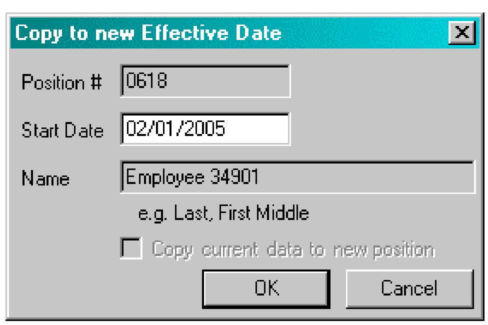
12. Click the first icon, **Back to position listing**, to return to the list.

RECLASSIFY AN EMPLOYEE KEEPING THE SAME POSITION NUMBER

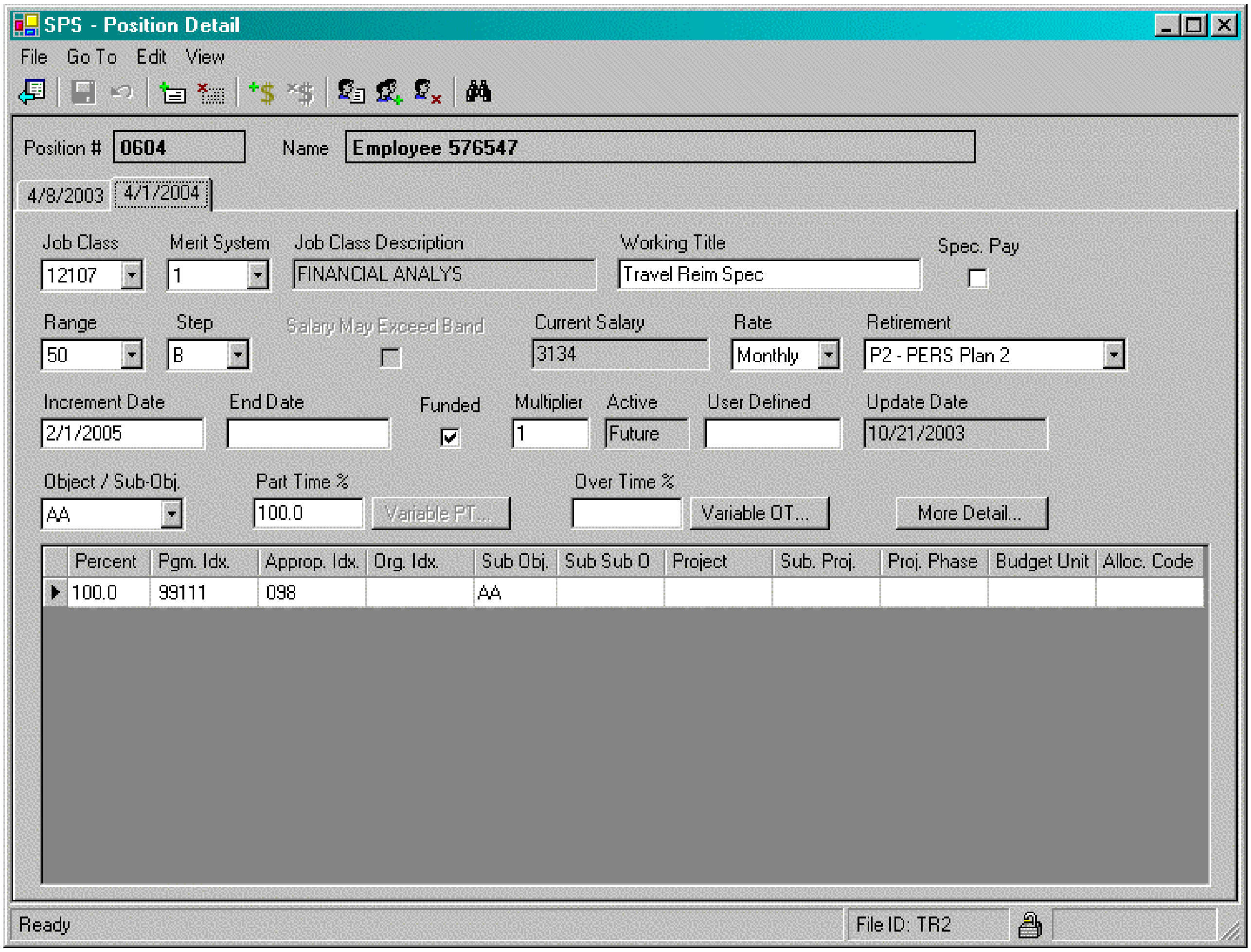
13. Double click to open the next position in the list to the **Position Detail** screen.



14. Select **Edit / Copy to New Effective Date**… 🕮 *Note: Copy to New Effective Date is used when changes will affect the salary projection results. It assumes the change is for the same person in the same position. For that reason, the only option available for selection is the Start Date. A common use would be to record a future in-training promotion. Other edit options exist for adding new positions and employees. You also have the option of simply changing the original record if there is no reason to associate a change with a particular date.*



15. Enter a **Start Date** for when this person and position change will take effect and click **OK** and click OK on the information message.
Start Date - 9/1/2004



16. You should now be returned to the **Position Detail** screen with two tabs for the selected **Position** and **Person**. The second tab uses the Start Date entered on the Copy selections in the last step.

17. Change the **Job Class** and **Merit System** for the position to reflect the future job class for the position.
    12107 – Financial Analyst 2
    Merit System - 1

18. Select the available **Salary Range** for the selected job class (or blank if no range exists for the job class).
    Range 50

19. Select the appropriate **Step**.
    Step B

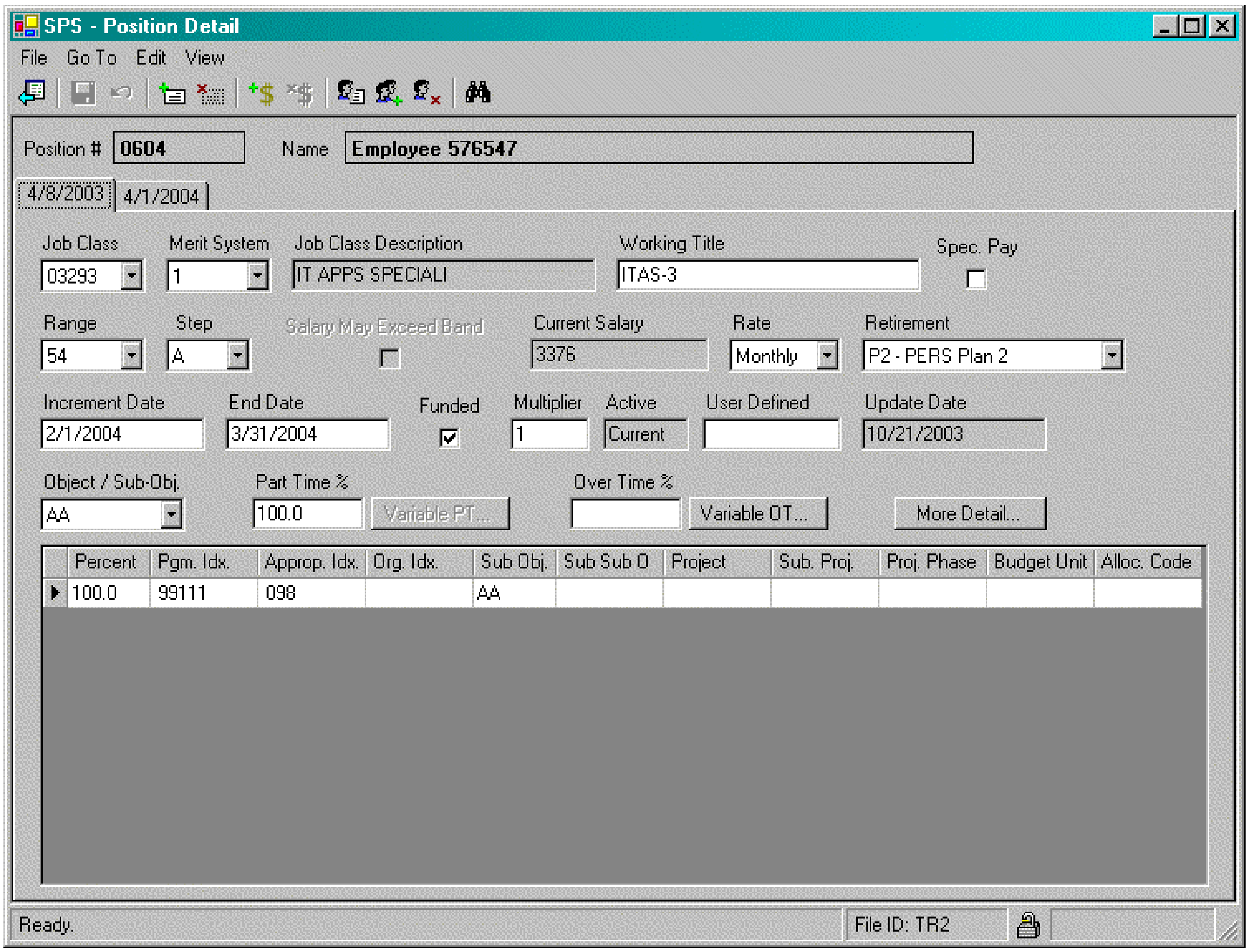
20. Note that the **Salary** has been updated to match the new salary range and step or available for entry if there is no salary range for the job class selected. 🕮 *Note: In SPS all positions with a job class that have a salary range are treated as classified positions, requiring the salary to be looked up from the state salary schedule. Positions with a job class that does not have a salary range are considered 'not classified' and you can enter the appropriate salary for the position. Job class 99999 is available for miscellaneous, non-classified entries.*

21. Enter a **Working Title** for the position.
Travel Reim Spec

22. Update **Increment Date**. *Note: Only positions with a salary range will list an increment date. All other positions are exempt from the State Salary Schedule and do not receive increments.* ***Review Date*** *will be available in this case.*
9/1/2005

23. Verify all other options for this position to ensure they are correct and select **Save**.

24. Click on the first tab that represents the previous position entry.



25. Verify the **End Date** is correct. The system should enter the day prior to the Start Date of the new instance into the original position. Adjust the **End Date** if necessary.

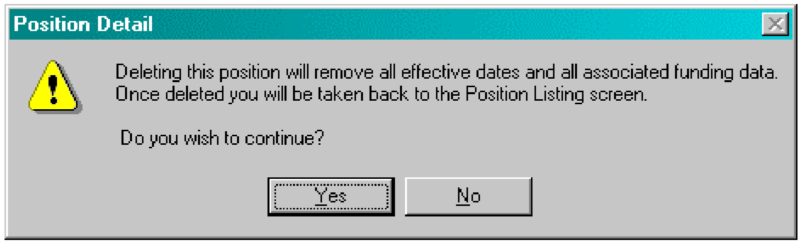
26. **Save** changes.

27. Click the first icon, **Back to position listing**, to return to the list.

DELETE POSITIONS

28. Double click to open the next position in the list to the **Position Detail**.

29. Select **Edit / Delete Position (All Tabs).** *Note: The Delete Position (All Tabs) option deletes all instances of the selected position and person. This means that if there were three entries for the person and position, all three entries would be deleted. A separate Delete Selected Effective Date (Tab) exists to delete only one instance of a position.*

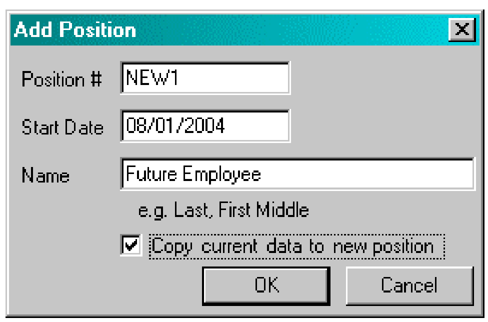


30. Click **Yes** to confirm the delete of all tabs for the selected person and automatically return to the **Position Listing** screen.

ADD A NEW POSITION COPYING INFORMATION FROM CURRENT TAB

31. Double click to open the next position in the list to the **Position Detail** that has a Salary Range.

32. Select **Edit / Add New Position** from the menu bar. *Note: You can also add from the* ***Position Listing*** *screen but the* ***Copy current data to new position*** *will not be available (see step 34).*



33. Enter the appropriate **Position #**, **Start Date**, and **Name** for the position.
Position # – NEW1
Start Date – 8/1/2004
Name – Future Employee

34. Verify **Copy current data to new position** is checked. *Note: This check box allows you to copy data from the position they have open to a new position. To enter a completely blank new position, leave this box unchecked.*

35. Click the **OK** button.

36. Review the Position Detail and make adjustments as necessary.

37. Update **Increment Date** to reflect the next increment due, and save changes.
Increment Date – 8/1/2005

38. Click the first icon, **Back to position listing**, to return to the list.

39. Double click to open the next position to the **Position Detail** screen.

40. In the first funding row of the position, click each field available starting with **Pgm. Idx. (Program Index)** and change the value to the first available in the list. *Note: You cannot change SubObject in this grid. Select SubObject in the dropdown list box above the funding grid and pick the next available SubObject. This SubObject will be used for all lines of the funding.*

41. **Save** changes.

42. Select **View / Find** from the menu bar.

43. Type your last name in the **Name** box or use the dropdown arrow ▼to bring up the list. *Note: Options available in the **Find Position** are only available for the last selected position listing view. If you have a view of Valid positions on the Position List, then only names and position numbers that are valid will be available. If a name that you would expect to see is missing, it may be that the particular record is invalid.*

44. Click on the dropdown arrow for **Position #** to select the position. *Note: You can use the find to select by either the position number or the name.*

45. Click **OK** to open your **Position Detail** screen.

46. Select **Edit / Add Fund** to add a new line to the fund grid.

47. Enter a new fund line using the second option available in each field.

48. Update the proration amounts of all lines to ensure they add up to 100% by entering 50% each. If the lines do not add up to 100%, the proration amounts will be displayed in red text. *Note: There are two rules of interest in regards to funding:*
    - *The first is funding proration for a position must add up to 100% or you will not be able to save the record.*
    - *At least one of program index, organization index, or appropriation index is required for each funding line in order to save.*

49. Give yourself a big raise. If you are not WMS, change the job class to WMS01 and Merit System 1. You should now be able to enter a salary. Check the **Salary May Exceed Band** option to enter a salary that is above the salary band.
    Salary - $9,999

50. **Save** changes when all information is complete.

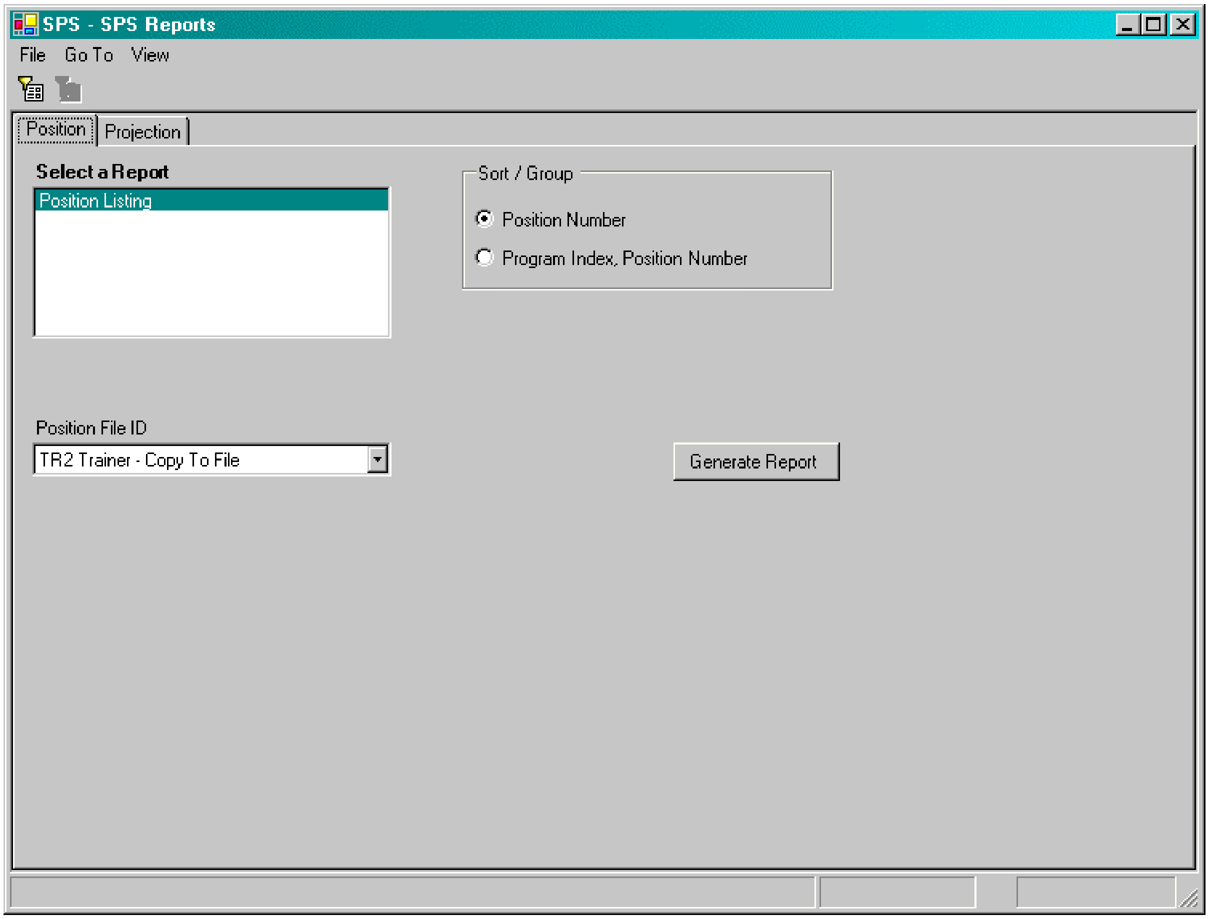
51. Take 15-20 minutes to try various **Position Detail** changes and note any questions. Optionally, you may practice on the Position File that you originally loaded HR data into.
    <your initials>1 - <your name> Training
    TR1 – Trainer Training

NOTES:

Lesson 2, Task 5 – Verify the Position File

It is almost time to start running and viewing projections now that the position file has been updated. But first we'll want to verify the position file we have created to ensure the projection is calculated off the correct information.

1. Select **Go To / Reports** from the menu bar.



2. Click on the **Projection** tab. There will not be any report options available for projections if there are no projection files available for the agency.

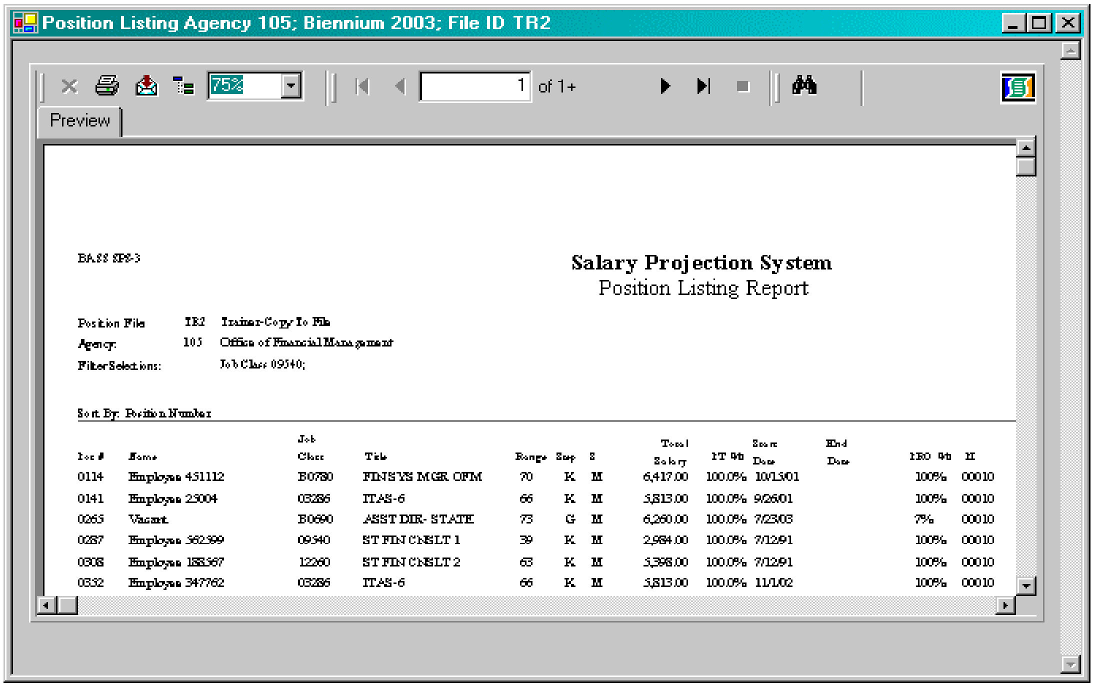
3. Click on the **Position** tab.

4. Click to select the **Position Listing** report.

5. Select the Copy To position file from Lesson 1, Task 3 in **Position File ID** from the dropdown list box.
   <your initials>2 – <your name> - Copy To File
   TR2 – Trainer-Copy To File

6. Select the desired **Sort / Group** option for the report.
   Position Number

7. Click **Generate Report**.



8. Click the Printer icon to print this report.
   No need to print when in a training session

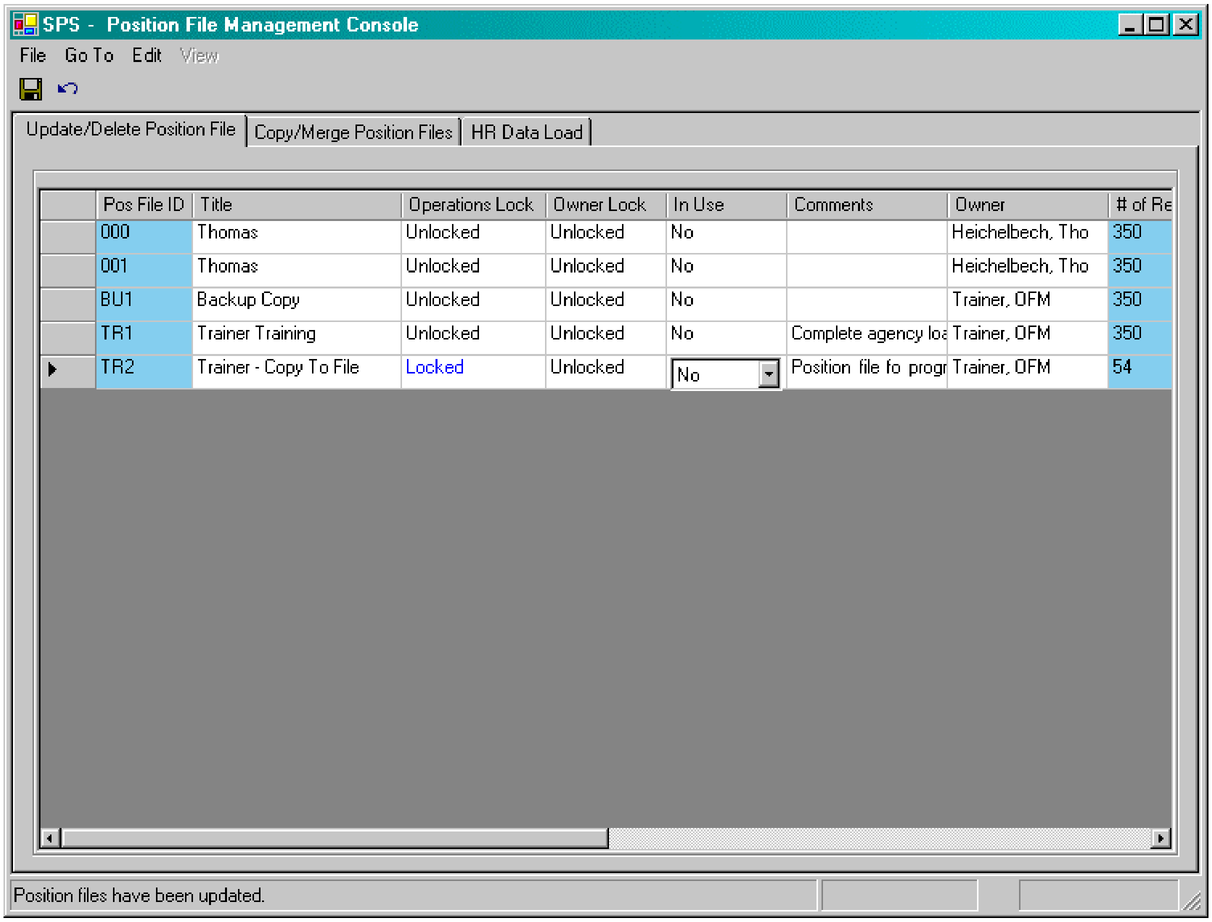
9. Click the **X** in the upper right hand corner to close the report screen.

10. Verify the data or route to manager for verification. If errors exist, select **Go To / Positions / Position Listing** to go back and edit, add, or delete position records as necessary. The report includes an **Invalid** column to easily identify any position records that remain in the file which have exceptions. 🕮 *Note: The envelope icon will bring up options for exporting the report to Excel or Rich Text Format (RTF) that is readable by Word. You could export the report and attach to an e-mail to facilitate sharing results for validation.*
    Assume no changes needed for training

Lesson 2, Task 7 – Lock the Position File and Update Comments

SPS allows users to lock position files. A lock indicates that an edit access user who is not the owner (or any edit access user if a Budget Operations lock is placed) cannot make changes to the file. Further, no locked position files may be deleted by any user. The file must first be unlocked. This task takes you through the process of locking a file and updating comments to indicate what the locked file represents.

1. Select **Go To / Positions / Update/Delete Position File** from the menu bar.



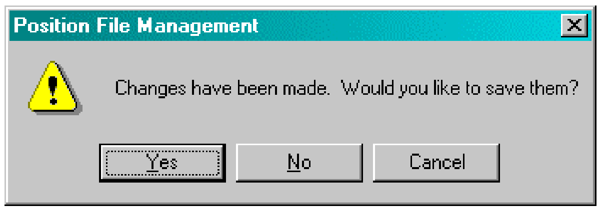
2. Click in the box for the position file to be locked, **Operations Lock** column to invoke the dropdown list box and select Locked. 🕮 *Note: A Budget Operations Lock prohibits all agency Edit Access users from making changes to the position file. File Owners that are Edit Access may also set an Owner lock that will prohibit all Edit Access users who are not the file owner from making changes to a position file. No file that has a lock set can be deleted.*
<your initials>2 – <your name> - Copy To File
TR2 – Trainer-Copy To File

3. Click in the **Comments** column for this position file and change the comment to indicate the status of the file and what the positions represent.
Position file for program XXX. All positions included verified correct for the 2003-05 initial allotments.

4. Select **File / Save** or click the Save icon in the tool bar to save changes.

5. Click on the row header to the left of the **Position File ID** to highlight the file that represents the full agency extract and select **Edit / Delete Selected Row(s)** from the menu bar to delete.
<your initials>1 - <your name> Training
TR1 – Trainer Training

6. Select **Go To / Projections /Run Projection** from the menu bar.



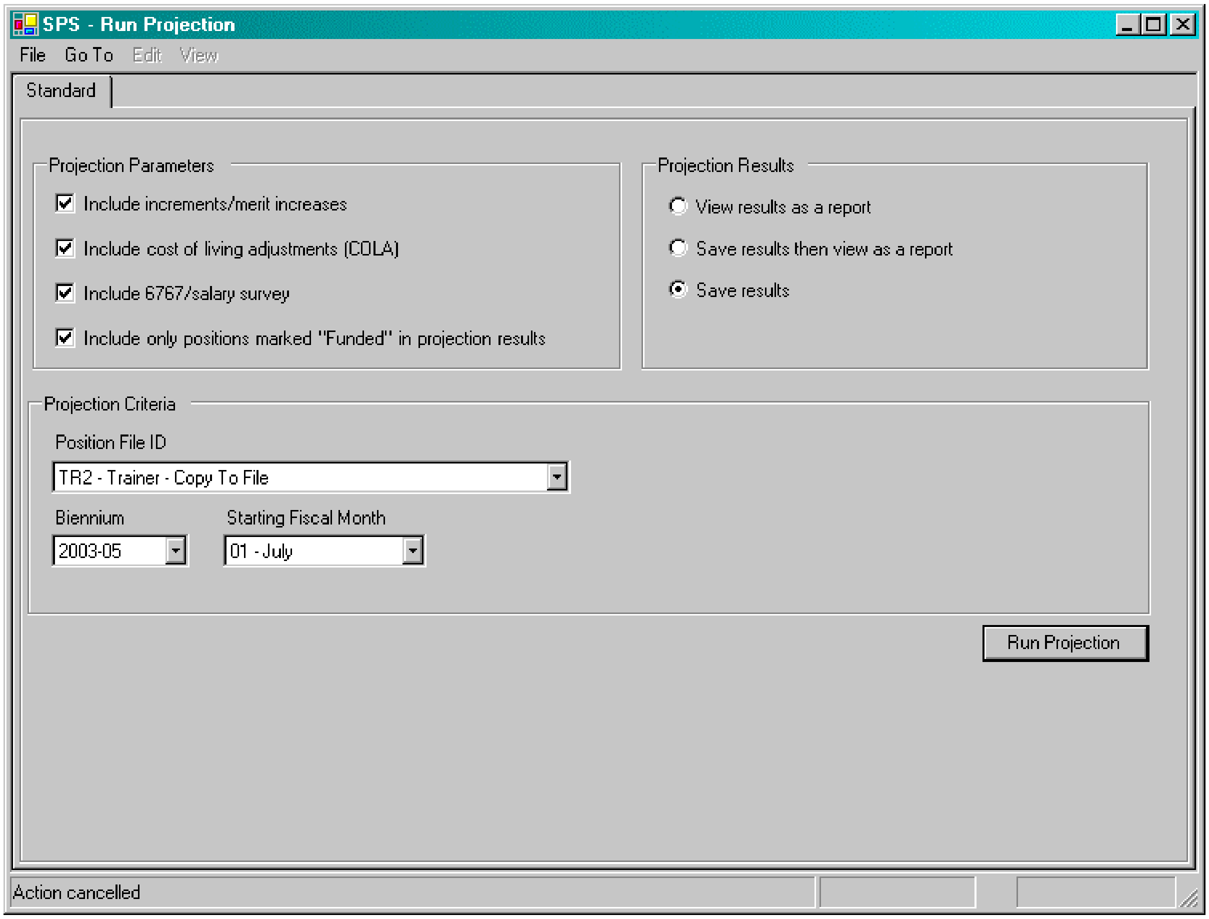
7. Select **No** to keep this file and continue to the Run Projection screen. *Note: You are prompted to save changes. You must save changes after selecting to delete a file before the file is actually deleted from SPS.*

LESSON 3 – RUN A PROJECTION

Lesson 3, Task 1 – Run a Projection and Save Results

The process of running a projection is separate from the process of running a report. This task will explore creating the projection and the option of saving the results.

1. Select **Go To / Projections / Run Projection**.



2. Select the **Projection Parameters** to be included in the projection calculation. 🕮 *Note:*
   - *Include increments/merit increases will apply step increases to classified employees:*
   - *Include cost of living adjustments (COLA) will look to see if a COLA adjustment has been indicated for the projection period by the SPS administrator and apply the increase;*
   - *Include 6767/salary survey will check for changes in the Job Class schedule for salary range in the projection period and calculate the salary using any new salary ranges found;*
   - *Include only positions marked "Funded" in projection results will exclude any positions that are not checked funded.*

   Include all four options

3. Select the **Position File ID** to calculate the projection.
   <your initials>2 – <your name> - Copy To File
   TR2 – Trainer-Copy To File

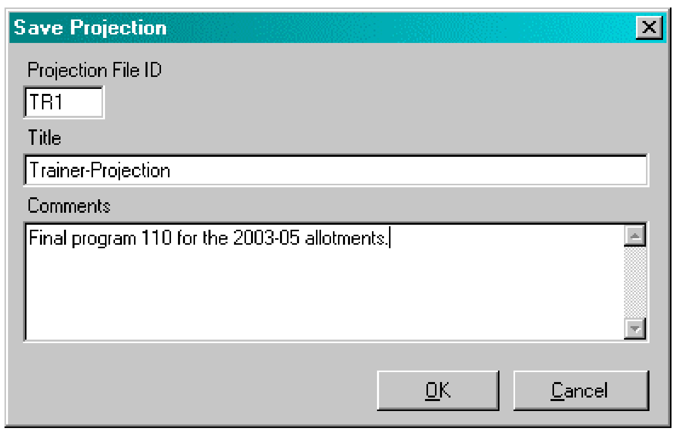
4. Select the **Biennium** for which to project salaries.
   2003-05

5. Select the **Starting Fiscal Month** for the projection. *Note: The display of the dropdown list box options is FM – Name (i.e., 14 – September is September of the second fiscal year). Picking a fiscal month other than 01-July will create zero amounts in preceding fiscal months.*
01-July

6. Select an option for the Projection Results. *Note:*
   - *View results as a report will create an Allotment Summary report without first saving the projection data. You will have an option of saving the projection data once the report is displayed.*
   - *Save results then view as a report will ask you to enter a file ID and title to save the projection results prior to running the Allotment Summary report.*
   - *Save results will ask you to enter a file ID and title to save the projection results, but no report will be produced. Since the file is saved, you can still run any of the reports available for the projection file from the reporting option.*

   Save results

7. Click **Run Projection** to begin the projection process.



8. Enter a desired **Projection File ID** and **Title** for this projection result. *Note: The Projection Files are independent of the Position Files. You can enter any ID including the same ID as used for the Position File as long as that ID has not already been used for the selected Projection Period for the indicated biennium (step 4 above).*
<your initials>1 – <your name> - Projection
TR1 – Trainer-Projection

9. Enter a comment that adequately describes the projection results. *Note: The parameters selected to run the projection are saved with the Projection file and are available in the Update/Delete Projection File screen (reviewed in Lesson 3, Task 3) as well as displayed on reports. You may choose to use the comments to enter information not otherwise captured.*
Final program XXX for 2003-05 allotments

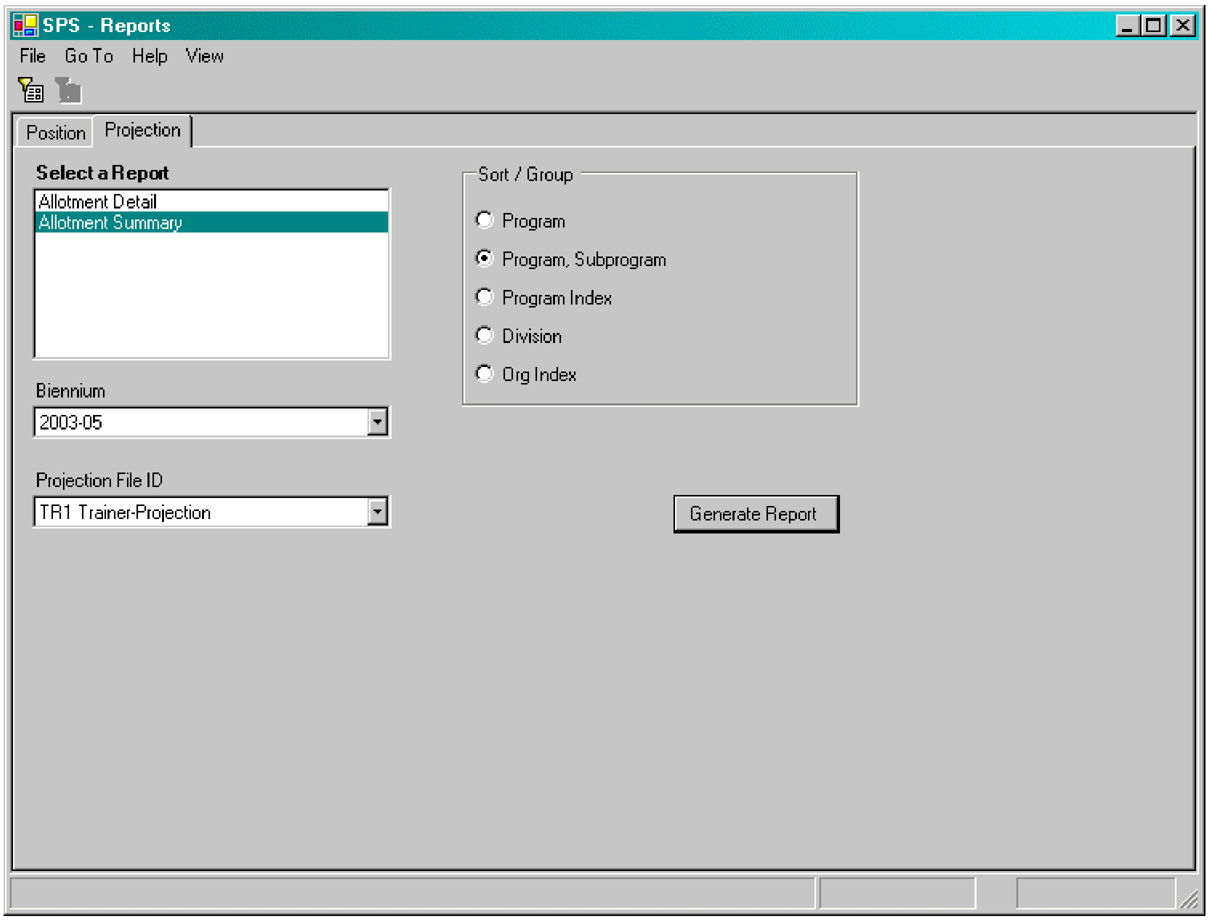
10. Click **OK** to run and save projection.

Lesson 3, Task 2 – View Projection Reports

The projection results are now saved as an independent file. There are two varieties of reports available for reporting the results with a number of flexible sort options. Reports may also be filtered to limit the type of position projections included in the report.

1. Select **Go To / Reports** from the menu bar.

2. Click on the **Projection** tab to see the projection reporting options.



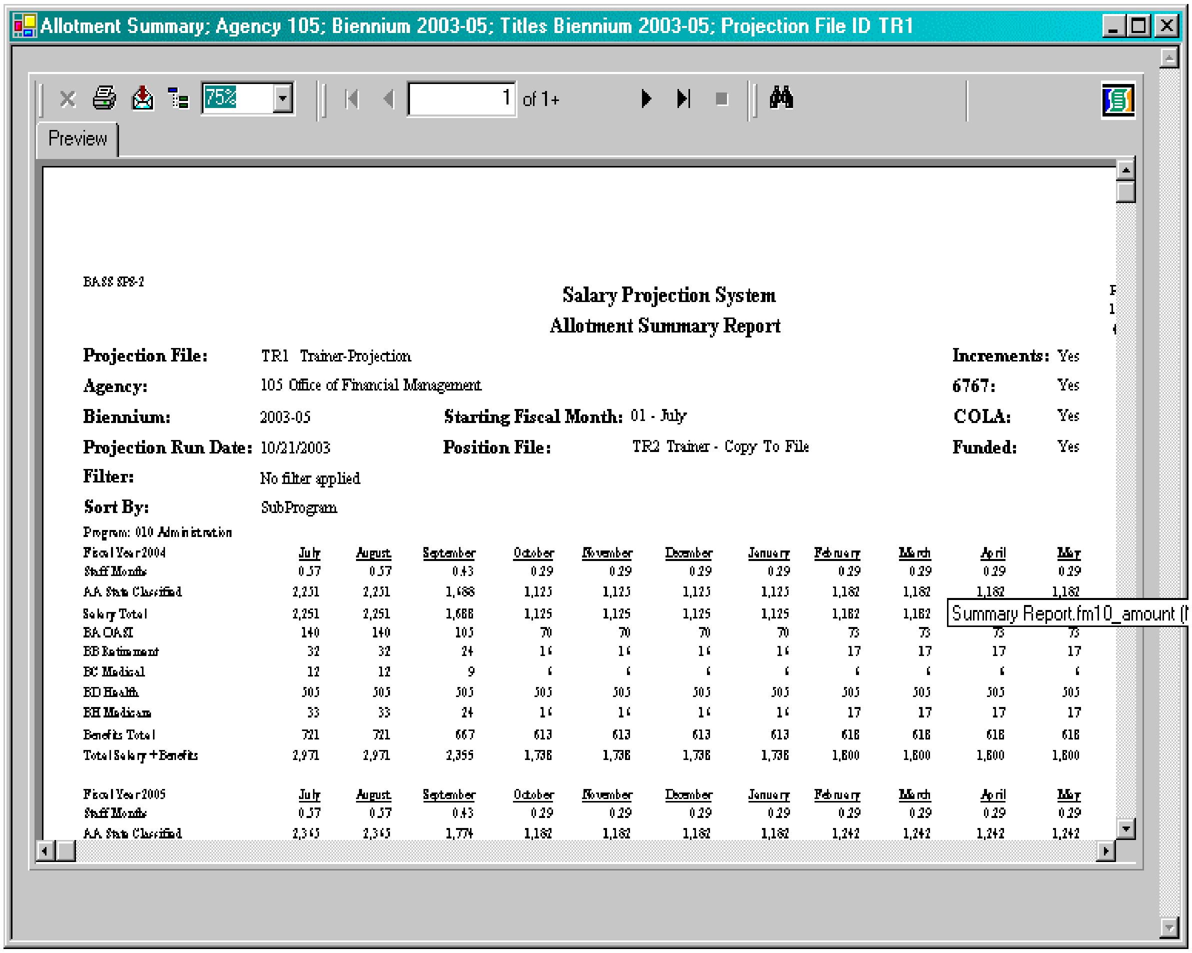
3. Select the **Allotment Summary** report.

4. Select the desired **Sort/Group** option for the report. 🕮 *Note: Each option will create a report with sorting and subtotals as chosen. All summary reports will be subtotaled on Appropriation Index within the selected group. SPS groups Appropriation Index based on the first two characters when defined with the same fund and appropriation type, so that related Appropriation Indexes (i.e., 011 and 012, both fund 001 and appropriation type 1) will be displayed on the same page.*
   Program, Subprogram

5. Select the **Biennium** and **Projection File ID** for the report.
   2003-05

<your initials>2 – <your name> - Projection
TR1 – Trainer-Projection

6. Click **Generate Report**.



BASS SPS-2

Salary Projection System
Allotment Summary Report

Projection File:	TR1 Trainer-Projection			**Increments:**	Yes
Agency:	105 Office of Financial Management			**6767:**	Yes
Biennium:	2003-05	**Starting Fiscal Month:**	01 - July	**COLA:**	Yes
Projection Run Date:	10/21/2003	**Position File:**	TR2 Trainer - Copy To File	**Funded:**	Yes
Filter:	No filter applied				
Sort By:	SubProgram				

Program: 010 Administration

Fiscal Year 2004	July	August	September	October	November	December	January	February	March	April	May
Staff Months	0.57	0.57	0.43	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29
AA State Classified	2,251	2,251	1,688	1,125	1,125	1,125	1,125	1,182	1,182	1,182	1,182
Salary Total	2,251	2,251	1,688	1,125	1,125	1,125	1,125	1,182	1,182	[illegible]	[illegible]
BA OASI	140	140	105	70	70	70	70	73	73	73	73
BB Retirement	32	32	24	16	16	16	16	17	17	17	17
BC Medical	12	12	9	6	6	6	6	6	6	6	6
BD Health	505	505	505	505	505	505	505	505	505	505	505
BH Medicare	33	33	24	16	16	16	16	17	17	17	17
Benefits Total	721	721	667	613	613	613	613	618	618	618	618
Total Salary + Benefits	2,971	2,971	2,355	1,738	1,738	1,738	1,738	1,800	1,800	1,800	1,800

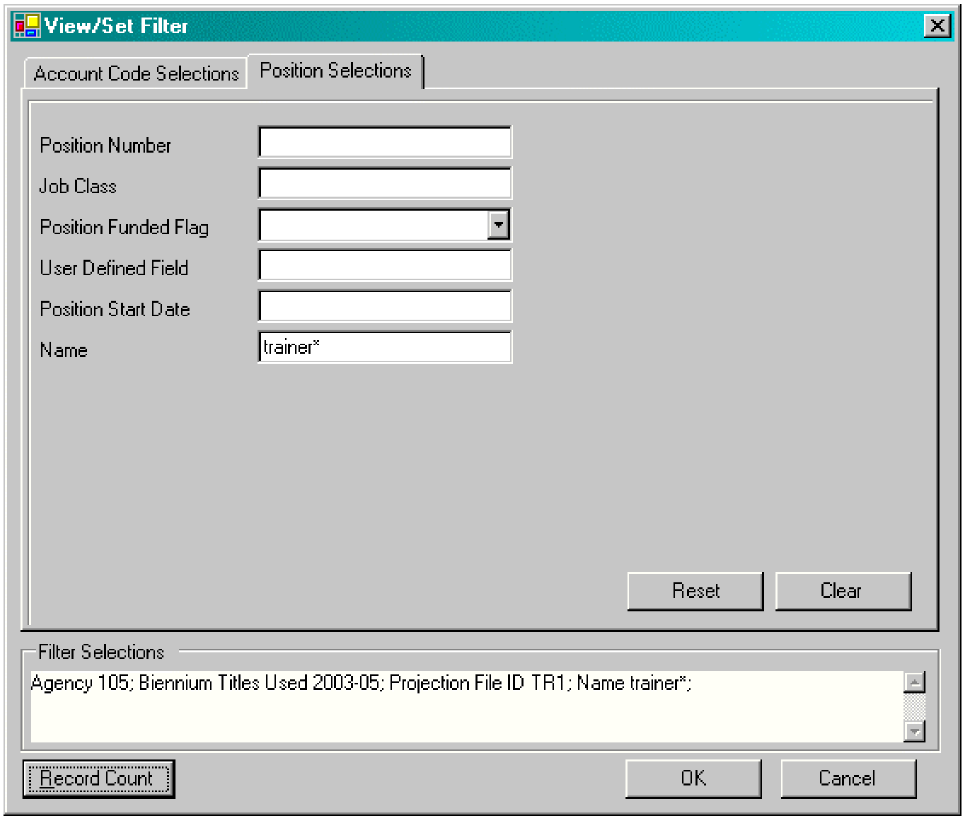
Fiscal Year 2005	July	August	September	October	November	December	January	February	March	April	May
Staff Months	0.57	0.57	0.43	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29
AA State Classified	2,345	2,345	1,774	1,182	1,182	1,182	1,182	1,242	1,242	1,242	1,242

7. Scroll through the pages to review the format, layout, and totals. *Note: You have the option of printing the report or exporting the report to Word or Excel. The report has been formatted for easy use in Excel without extra blank rows or columns.*

8. Close the report to return to the **Reports** screen.

9. Select **View / Set Filter** from the menu bar or select the Set Filter icon from the tool bar.

10. Click on the **Position Selections** tab of the filter.



11. Type your last name plus an * in the **Name** field of the filter. *Note: The filter allows a search on last name only. This can be a partial or full last name. The filter does not allow commas or spaces. By entering the "*" the filter will look for all names that match the letters entered here.*
e.g., Trainer*

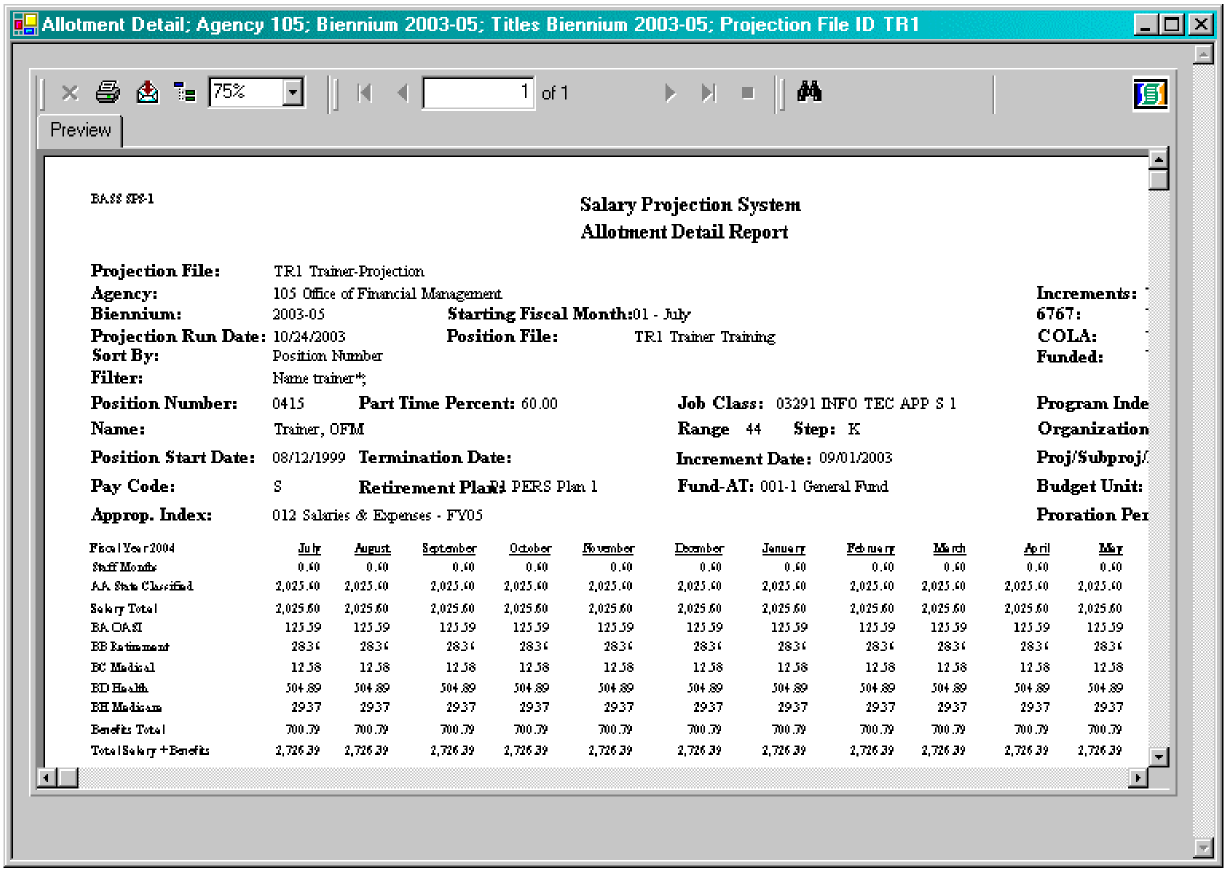
12. Click **OK** to apply the filter.

13. Select the **Allotment Detail** report.

14. Select the desired **Sort/Group** option for the report. *Note: The Allotment Detail report will show all totals for each combination of position number, person, and fund code*.
Position Number

15. Select the **Biennium** and **Projection File ID** for the report.
2003-05
<your initials>1- Trainer - Projection
TR1 – Trainer – Projection

16. Click **Generate Report**.



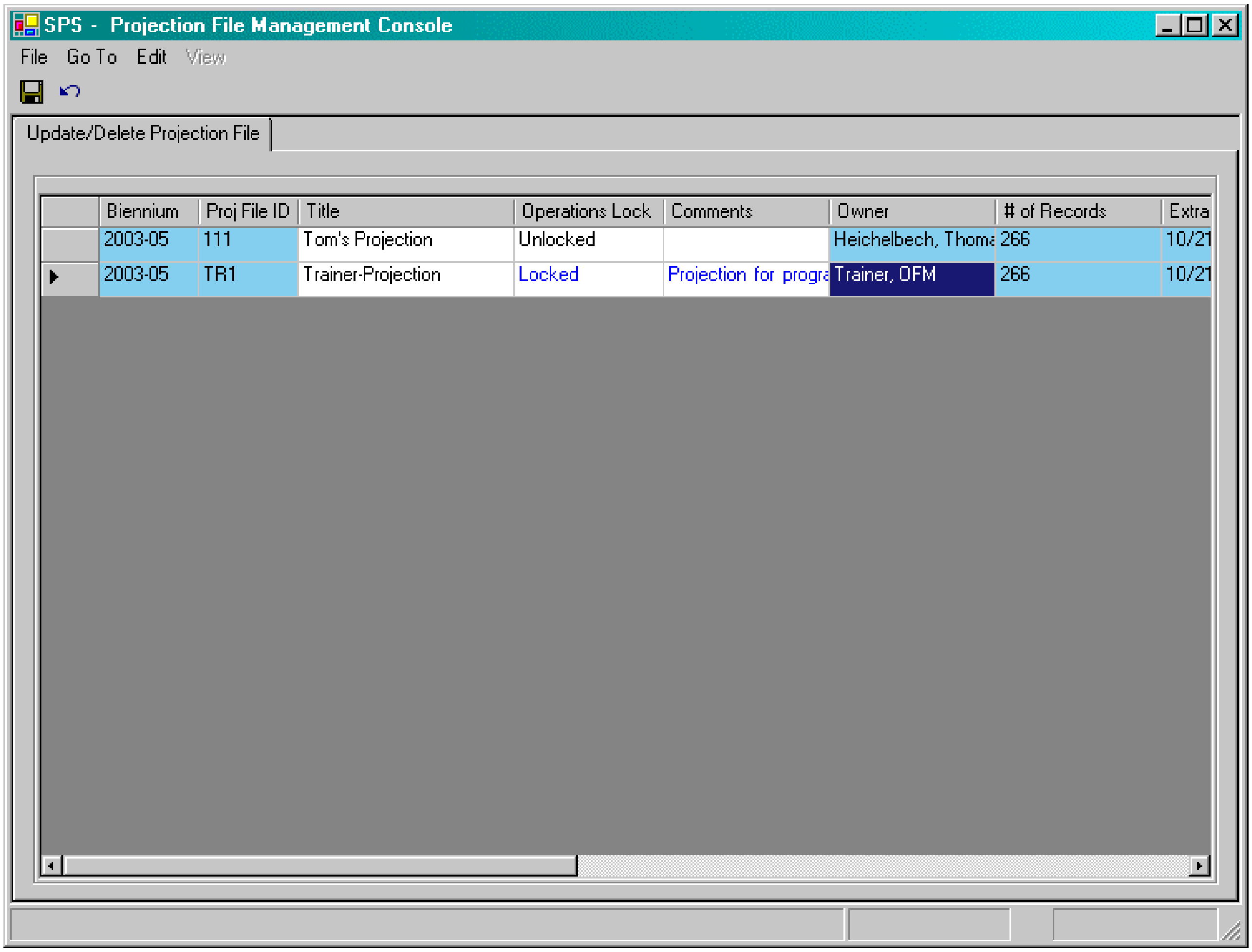
17. Review the report, noting the report header that identifies the filter set and page headers that indicates the person, position, and funding the page represents. 📖 *Note: The Allotment Detail report will allow you to investigate anomalies in your Allotment Summary at the detail level. The Allotment Detail report cannot be more than 2,000 pages with each page representing a person, position, funding line. It is recommended that you do not print an Allotment Detail report for your entire agency. The details of the projection are saved in SPS with the projection file and can be reported on any time producing the same results as the initial report.*

18. Click the **X** in the upper right hand window to close the report viewer.

Lesson 3, Task 3 – Lock a Projection File and Update Comments

You should now have a correct and accurate projection file and Allotment Summary reports to assist in allotment data entry. The final step is to lock the Projection File so it cannot be deleted and record comments regarding the projection.

1. Select **Go To / Projections / Update/Delete Projection File** from the menu bar.



2. Click in the **Operations Lock** column for the appropriate **Biennium** and **Projection File** to change to **Locked**. *Note: Projection files are identified by the Biennium projected for as well as the Projection File ID. This will facilitate common file names for the same purpose across biennia. A locked projection file cannot be deleted.*
   2003-05
   <your initials>1 – <your name> - Projection
   TR1 – Trainer-Projection

3. Enter a comment regarding this project in the **Comment** field from the Projection File.
   Projection for program XXX allotments, verified and validated positions and results.

4. Select **File / Save** from the menu bar or select the Save icon from the tool bar.

Congratulations. You have completed Salary Projection Using SPS!!!!

Appendix 1 – Business Rules & Usage Notes

General/System Wide

1. Only valid options are available in the startup dialog box. If your agency does not have any position files previously established, the only option available is to **Create a new position file**.
2. There are many icons available on the tool bar for many of the menu bar options. Hover your mouse over an icon to get text describing its function.
3. Changed fields turn blue to indicate that a change has been made but not yet saved.
4. You can use the **Ctrl** key to pick various positions in SPS lists without picking the options in between the selections (**Position Listing** and **Position Detail** only)
5. In SPS all positions with a job class that have a salary range are treated as classified positions, requiring the salary to be looked up from the state salary schedule. Positions with a job class that does not have a salary range are considered 'not classified' and you can enter the appropriate salary for the position. Job class 99999 is available for miscellaneous, non-classified entries.
6. Watch the lower left hand corner of the screen, the Status Bar, for information on the action the system is taking or has taken.

Filter

1. Account code options listed in the filter are based on codes found in the selected position file.
2. Valid Records indicate the number of records matching the filter criteria that are valid. Invalid is the number of records that were flagged as invalid on the HR Data Load. More information on invalid records is detailed in Lesson 2, Task 2 – Correct Exception (Invalid) Positions**.**
3. You can filter on any combination of account code or available position options (i.e., all Secretary Admin with a position start date greater than 7/1/2003 in program 010 with appropriation index 011).
4. Always verify that the **Filter Selections** registers your selections. Generally, you must tab off a field before it gets picked up.
5. The filter can search on a number of options (e.g., Program and Job Class) as long as the selections do not get too complex. The below examples are valid search options. These are generally available throughout the filter depending on the data type:
   - Job Class - **12*** (returns all job classes that begin with 12)
   - Job Class - **120?1** (returns all job classes where the first three-characters are 120 and the last character is 1 regardless of what the fourth-character is)
   - Job Class - **=** (returns all job classes where the job class code is blank)
   - Job Class - **12000-12040** (returns all job classes within the range of 12000-12040)
   - Job Class - **12010, 12020, 12030** (returns all job classes matching 12010, 12020, or 12030 (maximum of five values per field is allowed).
   - Salary - **> 2000** (returns all records where the salary is greater than $2,000. < and <> are also allowed)
   - Name - **Ove*** (returns all records where the name as displayed begins with "ove". By default HR data loads Last Name, First Name. The only option to search on name is to enter the first part of the name as displayed and enter * at the end. Spaces and commas are not allowed).
6. The filter allows a search on last name followed by an * only (i.e., jones*) This can be a partial or full last name. Do not enter Jones, Edward as the comma and space are not allowed.

Position File Management

1. An Owner Lock prohibits other agency Edit Access users from making changes to the position file. Budget Operations users may also set a Budget Operations lock that will prohibit all Edit Access users, including the file owner, from making changes to a position file. No file that has a lock set can be deleted.
2. See **Update/Delete Position File** for information on the file owner and on locks applied or to change locks.
3. You are prompted to save changes when you select files for delete. You must save changes after selecting to delete a file before the file is actually deleted from SPS.

HR Data Load

1. You must first create a position file before you can load HR data.
2. You will know the data has been loaded by watching the message in the status bar, lower left hand corner of the screen.

Exceptions (Invalid Records)

1. Position files will load displaying records marked with exceptions (invalid records) by default.
2. Vacant positions are always loaded as exception records since certain data elements are missing.
3. A complete listing of possible Invalid Data Comments and the suggested resolutions are contained in Appendix II of this tutorial.

Copy/Merge Position Files

1. A position file must already exist for you to copy.
2. The Confirmation Box contains a few options to consider when copying files with a filter applied.
    - **Yes** to copy based on the filter options.
    - **No** to copy the entire file without regard to the filter.
    - **Cancel** will close the confirmation box, canceling the copy.

Position Listing Screen

1. It will take longer to load the **Position Listing** screen the first time for the current session as SPS looks up information such as job classes and retirement systems.
2. By default, position files will load displaying records marked with exceptions (invalid records) unless none exist.
3. Other view options are available for your convenience; multi-filled positions, current appointments, future appointments.
4. All position numbers that have more than one record will be displayed with the Multi-Filled Positions options. If one instance of the multi-filled is an exception record and the other instance is a valid record, the two records will be displayed in their respective list, only displaying one instance per view option.
5. If the position file data results in more than 2,000 records, the system will prompt you to go to the Filter to limit the selections. SPS cannot load more than 2,000 position records in the Position Listing. Select the option to filter your data if you receive this warning.
6. Vacant positions are always loaded as exception records since certain data elements are missing.
7. You must save changes after selecting to delete a position before the position is actually deleted from SPS.

Position Detail

1. The **Delete Position (All Tabs)** option deletes all instances of the selected position and person. This means that if there were three entries for the person and position, all three entries would be deleted. A separate **Delete Selected Effective Date (Tab)** exists to delete only one instance of a position.
2. The **Copy current data to new position** check box in the **Add Position** screen allows you to copy data from the position open to a new position. Leave this box unchecked to enter a new blank position.
3. You can also add from the **Position Listing** screen but the **Copy current data to new position** will not be available.
4. The system will warn you to check start and end dates on all positions affected when copying position information.
5. SPS will enter the day prior to the new effective date as the end date on the original position by default.
6. Only positions with a salary range will list an increment date. All other positions are exempt from the State Salary Schedule and do not receive increments. **Review Date** will be available in this case.
7. Part-time and overtime can be entered in one of two ways:
   - Part Time % or Over Time % on the Position Detail screen assumes the factor will apply to all fiscal months of any projection run.
   - Each have a **Variable** button that will open a separate dialog box where you can enter variable factors for all 24 months of a biennia.
8. Fund code changes are not recognized until you tab off the code field.
9. You cannot change SubObject in the funding grid. Select SubObject in the dropdown list box above the funding grid. This SubObject will be used for all lines of the funding.
10. There are two rules of interest in regards to funding:
    - The first is funding proration for a position must add up to 100% or you will not be able to save the record.
    - At least one of program index, organization index, or appropriation index is required for each funding line in order to save.
11. You can simply update a position when the changes are not projection sensitive. If changes should result in projection changes specific to a point in time, then you should end the current position and add a new position or use the **Copy to new effective date** option.
12. Options available in the **Find Position** are only available for the last selected position listing view. If you have a view of Valid positions on the Position List, then only names and position numbers that are valid will be available. If a name that you would expect to see is missing, it may be that the particular record is invalid.
13. You can use the find to select by either the position number or the name.

Projections

1. Projection options include:
   - **Include increments/merit increases** will apply step increases to classified employees.
   - **Include cost of living adjustments (COLA)** will look to see if a COLA adjustment has been indicated for the projection period by the SPS administrator and apply the increase.
   - **Include 6767/salary survey** will check for changes in the Job Class schedule for salary range in the projection period and calculate the salary using any new salary ranges found.
   - Include only positions marked “Funded” in projection results will exclude any positions that are not checked funded.
   - **View results as a report** will create an Allotment Summary report without first saving the projection data. You will have an option of saving the projection data once the report is displayed.

- **Save results then view as a report** will ask you to enter a file ID and title to save the projection results prior to running the Allotment Summary report.
- **Save results** will ask you to enter a file ID and title to save the projection results, but no report will be produced. Since the file is saved, you can still run any of the reports available for the projection file from the reporting option.

2. The display of the dropdown list box options for **Starting Fiscal Month** is FM – Name (i.e., 14 – September is September of the second fiscal year). Picking a fiscal month other than 01-July will create zero amounts in preceding fiscal months.
3. The Projection Files are independent of the Position Files. You can enter any ID including the same ID as used for the Position File as long as that ID has not already been used for the selected Projection Period as indicated in **Biennium**.
4. The parameters selected to run the projection are saved with the Projection file and are available in the **Update/Delete Projection File** screen (reviewed in Lesson 3, Task 3) as well as displayed on reports. You may choose to use the comments to enter information not otherwise captured.
5. Projection files are identified by the Biennium projected for as well as the Projection File ID. This will facilitate common file names for the same purpose across biennia.
6. No file that has a lock set can be deleted.
7. You must save changes after selecting to delete a file before the file is actually deleted from SPS.

Reports

8. You will only be able to run one report at a time; previously generated reports must be closed before selecting a new report.
9. The envelope icon will bring up options for exporting the report to Excel or Rich Text Format (RTF) that is readable by Word. You could export the report and attach to an e-mail to facilitate sharing results for validation.
10. Each option will create a report with sorting and subtotals as chosen. All summary reports will be subtotaled on Appropriation Index within the selected group. SPS groups Appropriation Index based on the first two characters where the fund and appropriation type match, so that related Appropriation Indexes (i.e., 011 and 012, where in both cases fund is 001 and appropriation type 1) will be displayed on the same page.
11. You have the option of printing the report or exporting the report to Word or Excel. The report has been formatted for easy use in Excel without extra blank rows or columns.
12. The Allotment Detail report will show all totals for each combination of position number, person, and fund code.
13. The Allotment Detail report will allow you to investigate anomalies in your Allotment Summary at the detail level. The Allotment Detail report cannot be more than 2,000 pages with each page representing a person, position, funding line. It is recommended that you do not print an Allotment Detail report for your entire agency. The details of the projection are saved in SPS with the projection file and can be reported on any time producing the same results as the initial report.

Appendix 2 – Data Exception Errors (Invalid Records)

1. Code does not exist in titles tables (many variations exist)
   User Ed - Funding code titles must exist in the AFRS titles for the biennium associated with the position file. Please change your codes in SPS or add the code to AFRS. There will be a one-day delay for all codes entered into AFRS to appear in SPS.

2. Subobject is not valid for salary projection
   User Ed - Salary subobject must exist as a Valid Salary SubObject (see Rates)

AA	AB	AC	AD	AE	AF	AG	AH	AJ	AK	AL	AM
AN	AQ	AR	AS	AT	AU	NW	NZ				

   Change the subobject on these records to one of the valid options.

3. Position salary range is not valid for this job class per the Job Class table
   User Ed: A salary range must match either the salary range or special salary range from the job class table unless the position is Y-rated. Either correct the salary range to match the job class range or enter a generic job class code (blank and 99999 are both options in job class code) for a blank salary range.

4. Appointment salary does not match the salary in the State Salary Schedule
   User Ed: The salary must match the state salary schedule for the indicated salary range and step unless the position is Y rated. Either correct the salary to match the state salary schedule by reselecting the range and step on position detail, enter "Y" on the **Pay Code** of the **More Detail** screen, or enter a generic job class code (blank and 99999 are both options in job class code).

5. Salary exceeds band
   User Ed: The salary on the position is outside of the band limits as identified in SPS. Check "Salary May Exceed Band" on the Position Detail to override the limit.

6. No merit system identified
   A valid Merit System is required in SPS.

7. Job Class does not exist in Job Class table or is missing
   User Ed: All positions require a valid job class for the indicated Merit System. Contact the BASS Help Line at 360 725-5278 if a valid job class is not available.

8. Increment date must be greater than Update Date
   User Ed: Classified positions require an Increment Date that is greater than the Position Start Date or Update Date in order to accurately calculate increments due.

9. Increment date does not match increment requirements
   User Ed: The State Salary Schedule identified how many months until the next increment is due. The increment date is excess of Increment Months. Change the increment date to match the requirements.

10. Proration Percent of funding lines must = 100%
    User Ed: Proration percent of funding lines must = 100%. Adjust the funding lines to equal 100%.

11. Part time % must be greater than 0

User Ed: A part-time percent of zero will result in no salary of FTE projection for the position. Change the part-time percent or variable part-time of the position to be greater than zero.

Appendix 3 – Release Notes

General

1. The agency must contain a Position File or errors will be created in navigating through the system.

2. Always tab off a field before selecting to save. If you have not tabbed off the field, the change will not be saved.

3. When sorting lists the sort is based on the text values displayed rather than the type of data (i.e., 10, 1000, 500 – since 5 comes after 1 or 1/1/2003, 10/1/2004, 2/3/3003 since 2 comes after 1).

4. In testing we have found very rare occurrences of errors that say “Unhandled Exception” or “Timed Out”. If you receive one of these errors, quit the application, log out of BASS. Log back into BASS and try again. The error should be cleared. If the error persists, contact the BASS Help Line at 360 725-5278 immediately. You will be asked the steps you took including what screen you were on and what screen you were trying to get to when the error occurred.

Position Detail

1. Salary is initially displayed with one decimal place when entered.

2. You must tab off a field after updating before you can save or that save will be lost.

3. Risk Classification is not being displayed. The Risk Classification rate is being applied to projections per the Job Class Table in SPS.

4. Users are required to reselect merit system, range, and step when changing the Job Classification for a position instead of auto-inserting the new salary range and retaining the merit system and step to lookup the new salary.

5. Salaries that are in excess of the salary band limit are being allowed when the option **Salary May Exceed Band** is not checked.

6. When a file is locked, the options to add or delete rows in the funding information are available. However, the save is not available so the data is locked and cannot be changed.

7. Users are allowed to save a position with a Part-time Percent of 0%. These records should be marked as exceptions as no projection will be calculated.

8. Date fields act irregularly but they will allow a date to be entered.

Projections

1. Projections for dates prior to the day run may not accurately reflect step changes.

Tutorial Evaluation - Salary Projection using SPS

	Strongly Disagree				Strongly Agree
This tutorial was helpful in getting me through the business process	1	2	3	4	5
This tutorial was helpful in getting me through the system technical processes	1	2	3	4	5
Additional training was not necessary given the structure and content of this tutorial	1	2	3	4	5
The steps of the tutorial successfully anticipated the special needs of my agency	1	2	3	4	5
The tutorial was clear, concise, and easy to understand	1	2	3	4	5
I did not need to request additional assistance to complete the business process	1	2	3	4	5
It was easy to find answers to my specific question in this tutorial	1	2	3	4	5

The best feature of this tutorial is:____

The worst feature of this tutorial is:_______________________________________

I found errors (grammar, punctuation, spelling, conceptual, technical) on the following pages:

____

Other comments:____

____

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Thank you for taking the time to complete this survey. This information will be used in revising this tutorial as well as developing future BASS tutorials. Please remit to:

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